

THINK Best Practice

Project Report:
**Service Delivery and
Modernization Review**

December 2020

Future Ready



LETTER

January 4, 2021

Mayor McIver and members of Council,

Thank you for the opportunity you granted **THink Best Practice** to work with your Public Works and Recreation and Parks teams.

Special thanks to Ms. Peggy Van-Mierlo-West for her leadership and guidance.

We would also like to recognize Mr. Troy Cameron, Mr. Ryan Deska, Ms. Teresa Shearer, and the members of their teams for their time and patience addressing promptly and expertly our many queries.

At **THink Best Practice** our aim is to provide realistic recommendations with a clear path towards implementation that build on the strengths and values of our clients.

We at **THink Best Practice** ensure the smooth gathering of information so that achievable recommendations can be made and as such this project presented some interesting challenges. For example, we seldom encounter organizations that have figured out the many daily trade-offs of time, resources, and capacity-based planning faced by municipalities as well as the Municipality of Northern Bruce Peninsula. However, this does present other issues that are highlighted in this report which we have recommended a mitigation strategy to overcome.

Additionally, **THink Best Practice** decided to add a strategic component to the review of MNBP's service delivery model which was determined early in the project.

Once **THink Best Practice** delved into the Municipality's practices and took inventory of data sets and processes, it was clear that the project's scope, centred on the operational efficiency of the Public Works and Recreation and Parks departments, needed to include the strategic imperative of adopting an integrative approach to governance, operations, and information.

In addition to delivering the nine items committed to Council on September 14, 2020, this report provides the rationale and steps necessary to implement integrative management practices to complement MNBP's operational style, based on individuals' performance and issue-handling abilities.

The recommendations in this report describe actions that lay the foundation for MNBP to remain successful well into the future and continue to offer best value to taxpayers.

Respectfully,

Lee Traill
Global President

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EXECUTIVE SUMMARY

The main message of this report is to emphasize that MNBP's (Municipality of Northern Bruce Peninsula) traditional way of doing things which includes numerous strengths and an honorable success record, are insufficient to meet the future challenges facing the Municipality.

The recommendation section of this report describes actions that once implemented address the project's mandate for:

- Identification of efficiency opportunities.
- Modernization options for services delivery, specifically for Public Works and Recreation and Parks.
- Assessment of governance practices to support MNBP's ongoing transformation efforts.
- Evaluation of digital solutions to automate booking of Municipal services.

Table 1 is summary of the specific activities undertaken as part of the project's mandate and are covered on the *Operational Efficiency Opportunities* section.

TABLE 1: Report to Council on September 14, 2020

| No | Deliverables | Recommendations & Activities |
|----|--|---|
| 1 | Assist and work with NBP to identify efficiency opportunities and provide practical recommendations to achieve them in relation to the review and improvement of services and processes. | <ul style="list-style-type: none"> • Consolidate procurement processes for better pricing and lower working capital • Standardize administrative tasks and reassign to supervisor level positions • Introduce a performance management dashboard for each function |
| 2 | Set up and jointly manage the Services Review Project including governance, performance metrics, schedule, and tasks to ensure timely deliverables and milestones are achieved. | <p>Changed the approach from:</p> <ul style="list-style-type: none"> • Analysis > recommendation >- report flow, to a • Conclusions > validation > recommendations > report flow |
| 3 | Conduct a review of the Municipality's services from an internal and external perspective. | Used best practice benchmarks as reference AND a self-service design as guide. |
| 4 | Conduct a Community Services and Public Works Service Delivery Improvement and Modernization Study. | <ul style="list-style-type: none"> • Conducted interviews w/managers, supervisors, and administrative coordinators. • Conducted interviews with technology vendors. |

| No | Deliverables | Recommendations & Activities |
|----|--|---|
| 5 | Assess automated booking systems to optimize time and improve service levels for online processing. | Added scope and included centralized CRM (customer management) for all citizens and electronic water billing. |
| 6 | Review the Public Works Department including roads and waste management service inquiries and payments. | Designed a performance dashboard and integrated process to automate supervisory tasks and record keeping. |
| 7 | Work closely with Council and key stakeholders to assist in the understanding of what NBP needs in order that the project remains on track and is successful. | Project scope expansion required four additional weeks but maintained same budget. |
| 8 | This includes governance structures as well as advice and planning with additional executive advice in the practical assessment of service delivery. Advise management and staff to ensure a return on investment (ROI) is achieved through careful planning. | <ul style="list-style-type: none"> Identified external trends for Council to factor in future organizational reviews, budget, and strategic plans. Included in scope an IT Framework to guide the selection, acquisition, implementation and use of technology at MNBP. |
| 9 | Work closely with NBP management and staff to ensure the organizational change management (OCM), training, and other implementation needs are achieved to a level that is satisfactory to the Municipality and residents. | Developed a program to project manage the recommendations in this report and facilitate the associated change process. |

In the early stages of this review, it was clear that MNBP’s management teams had mastered the trade-offs of time, resources, and capacity planning necessary to deliver services satisfactorily **AND** that while efficiencies are possible, the benefits of improving the current business model would be short lived.

This conclusion brought on the need to expand the scope of the project and identify organizational changes required by MNBP to lead its modernization efforts in a manner that maximizes its return on time and investment and minimizes risk to daily operations.

As a result, the basis for this services review delivers on identifying a set of recommendations to:

- Achieve efficiencies that prevents costs escalations
- Sets the foundation for adoption of technology
- Implementation of self-service, and
- Automates performance monitoring.

The main goal of this report is, by building on MNBP’s strengths, to provide a practical pathway for the implementation of the changes that will ensure MNBP is **Future Ready** to continue to deliver on citizens’ expectations and remain a reliable steward of taxpayers’ money and the Municipality’s wellbeing.

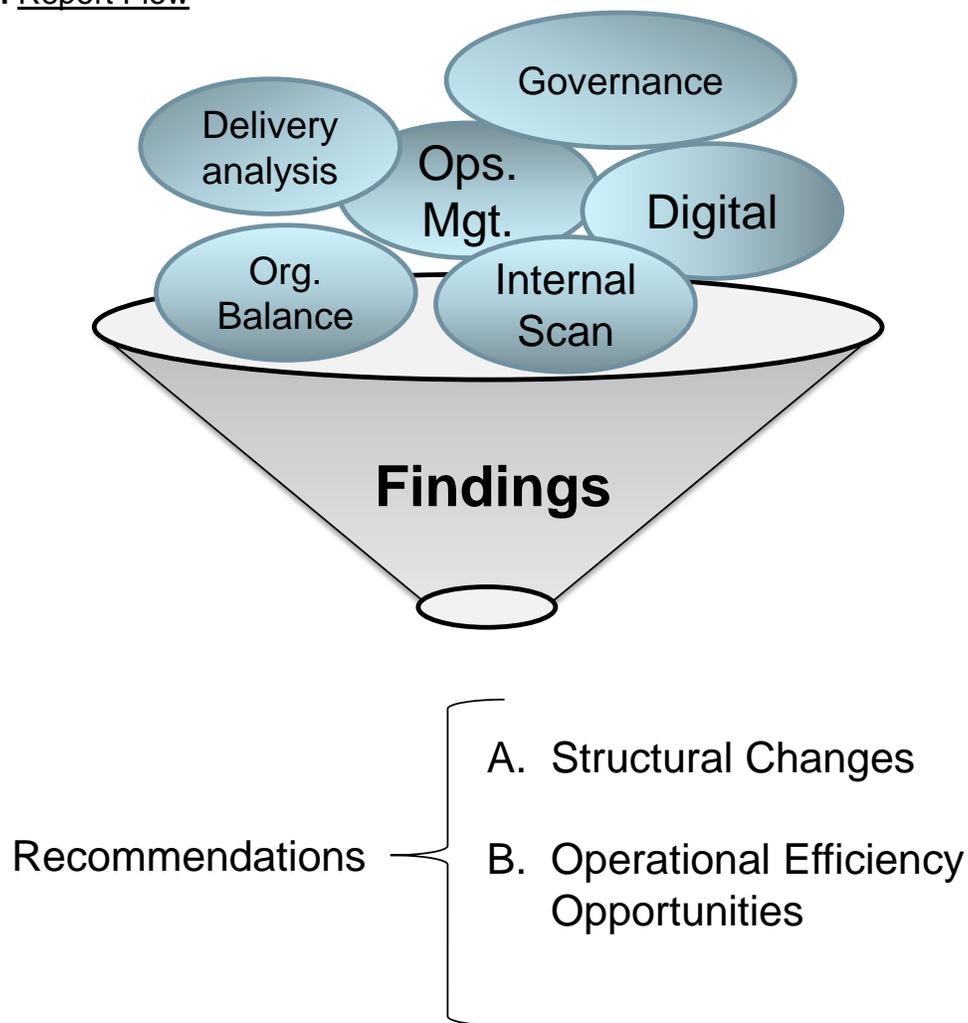
The report is structured around sections and its flow links the recommendations' strategic and operational rationale with the actions necessary for their implementation.

The *Internal Scan* section looks at MNBP's organization as a management system and describes the methodologies followed to:

- Evaluate operational performance
- Identify management style
- Determine IT maturity
- Assess strategic intent

The *Findings Section* is specific to Public Works and Recreation and Parks operations, which also follows these methodologies plus additional benchmarks against industry best practices.

FIGURE 1: Report Flow



The report's recommendations are presented in two sections:

- *Structural Changes*. Refers to modifications to the Municipality's operating model, such as:
 - Governance
 - Priority setting
 - Decision-making
 - Performance monitoring
 - Project and time management
 - Change management
- *Operational Efficiency Opportunities*. Refers to implementation of productivity and continuous improvement techniques:
 - Capacity planning management
 - Enterprise architecture
 - Business process design
 - Information management and systems

The rationale is presented as briefing notes and the implementation component of the recommendations as templates and action lists.

Change happens when new behaviours are adopted (or some behaviours are dropped), the recommendations in this report are meant to instill new practices; to “find” time through planning and empowerment; and free up managerial capacity with the introduction of performance management and new tools for operational efficiency. The good news is that because of MNBP's honorable operational proficiency, this report's recommendations, complement or are an effective addition to current practices.

MAIN MESSAGE

The archived section of The Bruce Peninsula Press offers the opportunity to “travel back in time” and learn about the successes, achievement and challenges affecting the Peninsula.

Underpinning the news regarding cottagers, visitors, road conditions, taxes, health care, parking, etc. are two themes of significance for Municipal decision-making which are consistently present:

1. The Municipality’s demographic composition is changing.
2. The expectation that data is readily available for any Municipal issue and decision.

These chronicles, as are the minutes from Council, confirm the trends already challenging staff at MNBP (Municipality of Northern Bruce Peninsula).

Information Strategy is a long-term plan to achieve an organization’s objectives in the management of knowledge, data, and information.

A change in NBP’s (Northern Bruce Peninsula) demographics implies an increase in the diversity of points of view, as the “typical” citizen is replaced by many constituencies, each potentially with different interests and needs.

The presence of diverse constituencies changes the context in which decisions and policy, including the municipal budget, are made. The usual way of handling issues increasingly requires analyses, even routine matters that were resolved through a cursory review, might need to be studied to consider all points of view.

This is not to say that issues were not carefully studied or that consensus were always present and easily achieved. It is clear that in the context of a highly homogenous constituency discussions tend to focus on deciding the best course of action and not necessarily on identifying and defining issues, as tradition is generally accepted and obviates the need for questioning long standing directions.

Municipalities with a highly homogeneous constituency, like MNBP, thrive by mastering issue handling. The ability to ‘jump into action and tackle issues’ as they show up is the most valuable aptitude to cultivate for ***issue handling organizations***; therefore, it is natural for municipalities to develop accordingly their budgets, organizational charts, and work, which is organized to resource, and when possible enhance, issue handling.

A municipality that contends with a diverse constituency, like MNBP, needs to evolve into a ***learning organization*** and master the ability to identify, define, explain, assess, and decide on issues before handling them.

Information management is the most valuable aptitude to cultivate for **learning organizations**, which inherently means the use of information technology to generate, store, organize, analyze, and report data.

Learning organizations are not necessarily better than issue handling organizations. In fact, both coexist and serve a distinct purpose.

Trouble occurs when the qualities of an issue handling organization are used to solve problems that can only be handled with the traits of a learning organization.

MNBP operates thanks to solid fundamentals, build over time through repetition by highly committed individuals that master their roles and make them their own.

Individualistic management refers to a style that depends on the self-reliance and autonomy of hands-on individuals that are operationally minded.

This approach to service delivery:

- Produces highly capable individuals that can handle any single issue that is thrown at them because they follow a hands-on approach to their work and are heavily involved with the front lines.
- Focus on transactions and daily activities.
- Reinforces relationships and creates a sense of dependability as individuals become proficient at multi-tasking, “putting out fires”, and keep things going.

This does not mean that there is little planning or preparation, it just recognizes that MNBP’s staff know what to do on given circumstances. In this context there is minimal need for reports, which explains why, at an organizational level, information management, although regarded as important, does not make it to the top of the list.

Private Sector Ideas for Government The power of Information in Amazon’s dominant position.

Adapted from various sources

Walmart has been for years either the #1 or #2 most valuable company by revenues – trading places with oil companies –; its logistics and operations prowess remains unmatched by its competition.

Yet Amazon’s market capitalization at US\$ 1.6 trillion is four times larger than Walmart’s US\$400 billion, even though Amazon’s revenues at around US\$ 280 billion, are a little over half of Walmart’s US\$500 billion.

Information management is the reason why investors reward Amazon so handsomely over Walmart. Every time someone clicks in Amazon’s website is telling Amazon what they want, how often, how much they are willing to spend, what products complement each other, etc., etc.

Armed with these information Amazon can learn its customers’ every needs and budget, anticipate which products and in what quantities will sell AND learn which ones will not AND which wants are wanted and not offered yet. The point is, **Amazon knows before it acts** and when a mistake is made, finds out and makes corrections almost immediately,

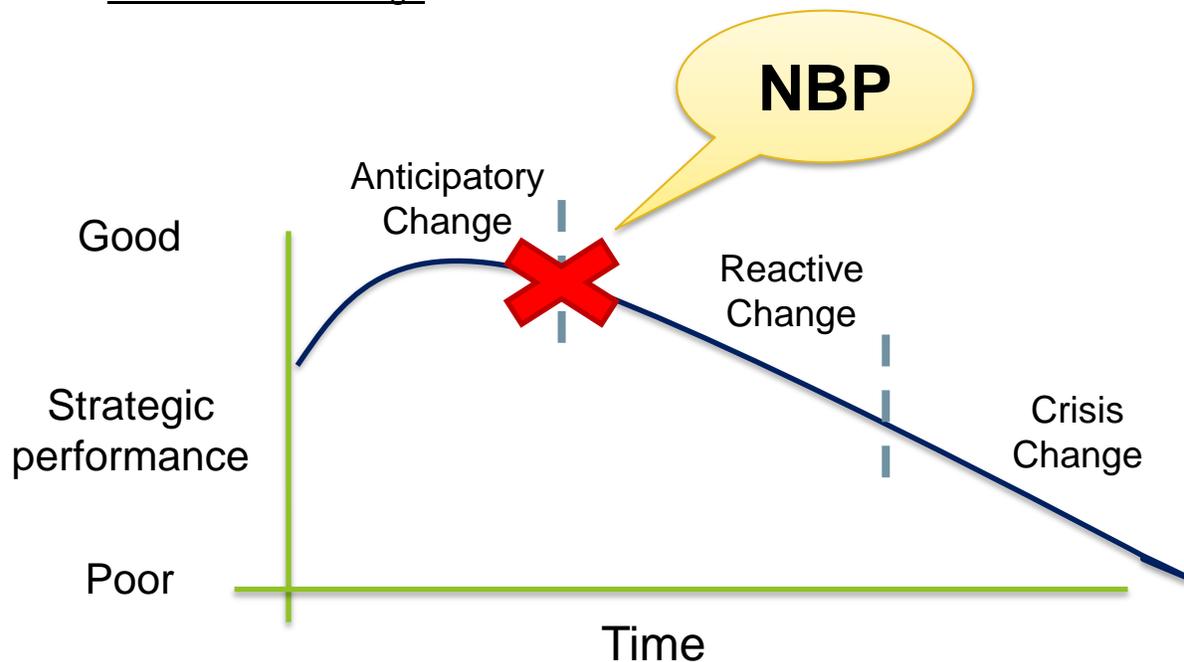
Walmart has similar capabilities, one of the first famous examples, of the power of information, came from the realization that beer and baby diapers were sold together in great quantities at night. Dads picked up beer when moms sent them for diapers at night. Now it is not socially acceptable, but this realization had at the time many store managers conveniently locate beer islands near the diapers section.

Amazon’s predominance is explained because their data mining spans the full consumer spectrum, whilst Walmart’s is limited to its stores, which is why Walmart is playing catch up in digital commerce.

As long as service demands can be satisfied by **doing** (fill in a pothole, process a registration, send a water bill, etc.) and what needs to get done is straight forward, this individualistic approach to service delivery is efficient. However it is not a long term viable option the MNBP should consider for its future.

The limitations of this approach start when services demands are about information (developers' inquiries, was garbage collected, what is the status of insurance compliance at the marina, a report on hours worked for winter control for the last five seasons, etc.). These service demands are satisfied by **knowing**.

FIGURE 2: Readiness for Change



The calibre and knowledge of MNBP's staff compensates for the absence of readily available reports, particularly when information needs follow a Q&A format.

Customers' expectations, and technology (comparisons with uBer and Amazon for example) will, however, continuously increase the volume of service requests that require information.

Eventually, information requests are expected to be dynamic, interactive, and in real-time, like in apps where streets plowed are shown.

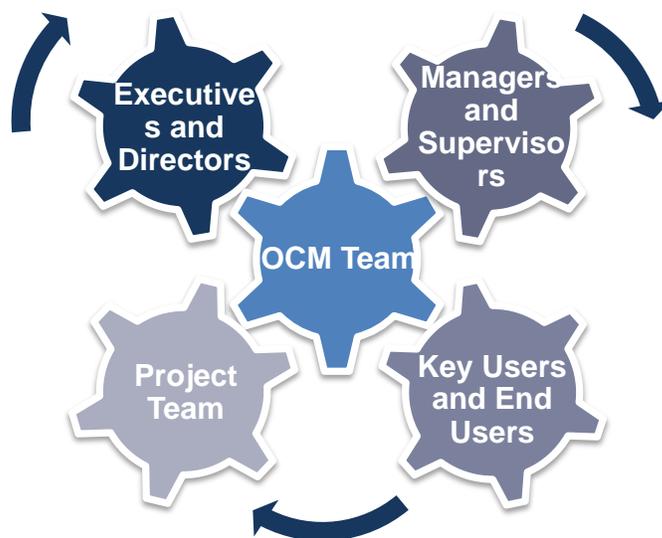
Information are facts and knowledge about a situation, an event, someone, or something.

A Report is the structured representation of information.

This need to "switch" from doing to knowing can only be made successfully with full organizational engagement in the development and implementation of an Information Systems Management Strategy.

FIGURE 3: Full Team Commitment

Who is involved?



EVERYONE IS RESPONSIBLE FOR THE SUCCESS OF THE PROGRAM!

The *Structural Changes* section of this report describes the details and methodology on how to engage stakeholders in the development and implementation of an Information Strategy that builds on MNBP's strengths.

The purpose of this section is to highlight that the upcoming challenges MNBP faces require structural changes that cannot be tackled in the traditional ways the Municipality conquered previous ones. Figure 1 tries to depict that timing to make changes matter; it is best to initiate change before too much energy and time are devoted to reacting.

To continue to succeed when work volumes increase it is not enough to work harder, or to add people to the front lines. It is not enough to get better at doing things because information and not action is where the answers are found.

These trends will increasingly restrain the managers' ability to remain in the front lines, to supervise by seeing, and anticipate by being in the field.

The switch from **doing** to **knowing** happens when the managers' time is increasingly devoted to:

- Answering public inquiries and requests
- Working on cost-benefit analysis
- Explaining decisions
- Explaining plans
- Justifying plans

- Explaining and answering questions about past projects
- Providing information about the way things work and get done.

These activities require data and the ability to easily convert it into meaningful and easily communicated information. It should be noted that the required data must be readily available for management to make informed decisions in real time.

The *structural changes section* of this report identifies the initiatives that facilitate the implementation and adoption of new practices and tools that will help the transition into a learning organization.

This section describes how the new reality that MNBP confronts turns business managers, like the ones from Public Works and Community Services, into consumers of information. They are perfectly aware of their data gaps, but because of the integrative nature of information systems management, they are not free to implement independent strategies.

The network effect of information systems management contravenes the individualistic drive that makes MNBP generally operationally proficient; as such, to prevent any conflicts, it must be conducted at a corporate level. These efforts need new functions and at least one or two new additional positions.

SERVICES REVIEW

A services review is usually conducted to:

- Confirm that the services offered are valued by citizens and customers.
- Assess the efficiency with which these services are delivered.
- Evaluate strategic readiness to adapt to trends and prepare *today* for *tomorrow*.

TABLE 2: Types of Services Review

| Services Review | |
|-----------------|--|
| Type | Construct |
| MACRO | <ul style="list-style-type: none"> • Governance • Strategy • Operational Plan • Enterprise Architecture |
| MICRO | <ul style="list-style-type: none"> • Knowledge base • Processes and procedures • Policies • Practices and protocols • Performance monitoring (KPIs) |

A services review is mainly a comparison between a benchmark(s) and a municipality's outcomes and the processes or practices followed to achieve them.

A comprehensive services review adds a temporal dimension by evaluating a municipality's ability to achieve and maintain high levels of performance over time.

Finally, a services review assesses the presence of operational intent by looking for evidence of well-defined outcomes that are:

- Meaningful for all levels of the organization
- Well known, understood, and pursued
- Good guidance for setting priorities.

First principles dictate that an ***inside out review*** is the best approach to assess MNBP's performance sustainability and future readiness.

2 ***Efficient, doing things right.***

1 ***Effective, doing the right things.***

#1 first to prevent getting good at doing the wrong things.

This approach assessed MNBP's organizational capacity to:

- Deliver on current responsibilities
- Anticipate and manage on-going environmental and contextual changes, and simultaneously,
- Work efficiently and effectively, operationally, and strategically.

The *Structural Changes* section of this report describes actions for MNBP to address the observations identified with the MNBP logo in this section.

This section describes the framework used by **THink Best Practice** for the organizational component of the services review. This section is concerned with identification of MNBP's modernization gaps, to find the path to transition from current to future state.

In the *Findings section* of the report are the observations specific to Public Works and Recreation and Parks operations.

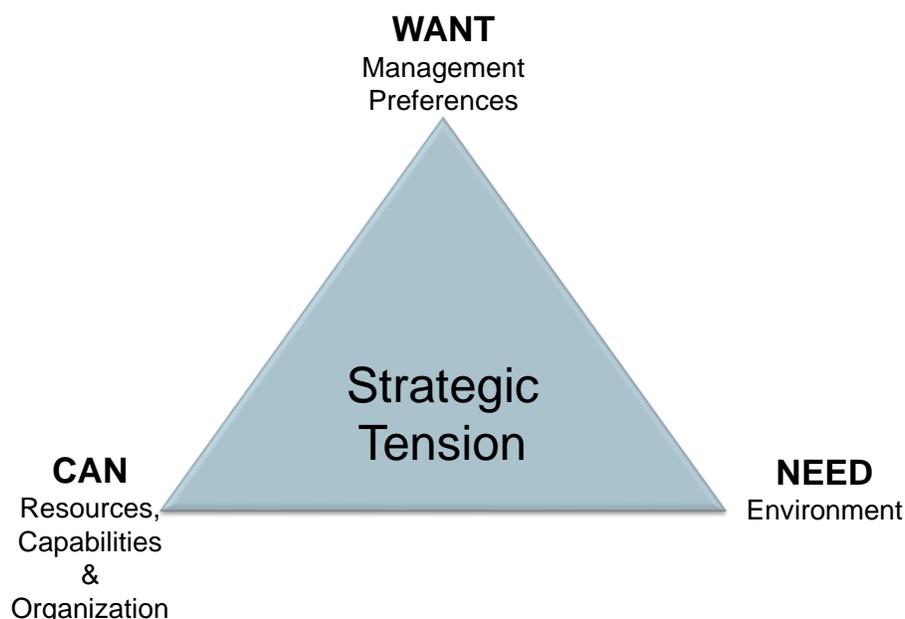
BENCHMARK 1: Organizational Balance

Figure 4 represents the three dimensions with which Council, the CAO and managers constantly grapple, with the goal of aligning and balancing them. The challenge exists because usually the sum of **WANT** and **NEED** is bigger than **CAN**.

This assessment aids in determining MNBP's available capacity to undertake any new and additional responsibilities, like for example the recommendations in this report.

One of the project's requirements is to assess OCM (Organizational Change Management) requirements for the implementation of the recommendations on this report, and this analysis helps identify an implementation path.

FIGURE 4: Resources and Organizational Balance



WANT Mainly the purview of Council; with their understanding of the political environment and as official representatives of their citizens, Councillors are through their decisions and direction to staff they either endorse or originate all Municipal plans and new projects, needed to deliver all approved services. **WANT** is dynamic in nature and composed by a mix of:

- Ideas, like a digital booking platform.
- Preferences: for example, response time to answer developers' inquiries.

- Expectations, which are usually linked to performance and outcomes, like transparency, expediency, and efficiency.

NEED For the most part the domain of Municipal staff, are the resources required to perform service delivery and administrative tasks. **NEED** encompasses all present and future obligations:

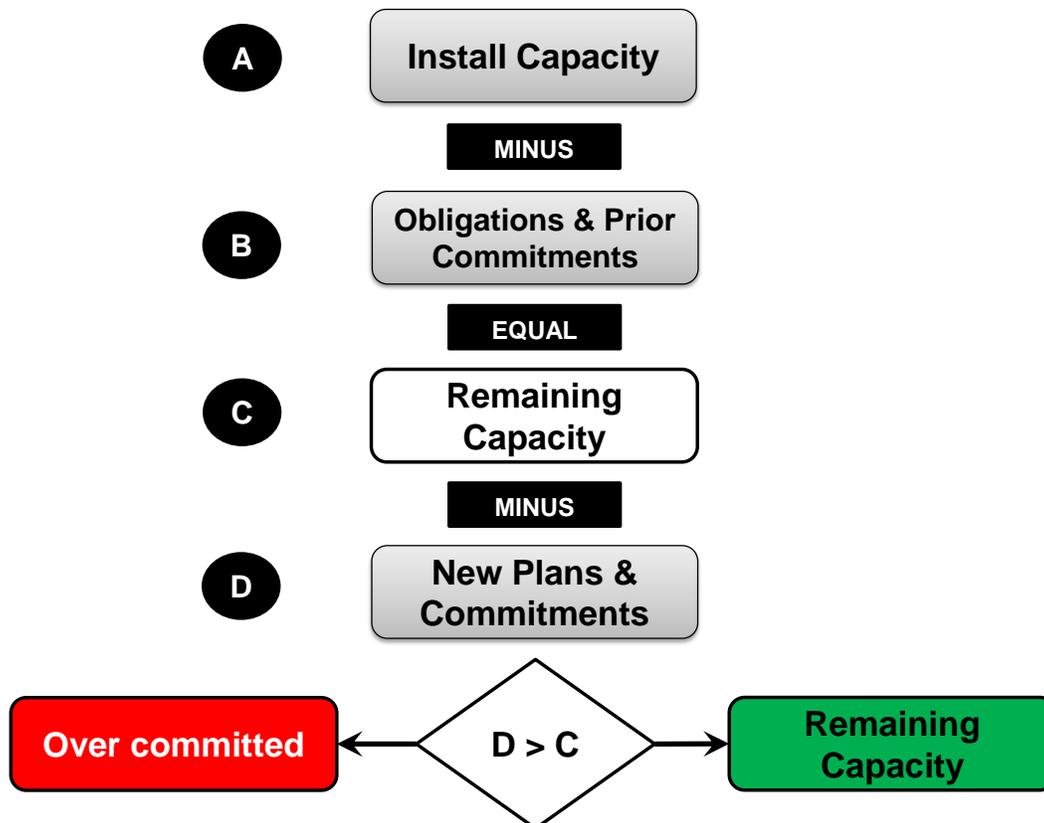
- Legal: such as ESA and Health and Safety.
- Accountability for taxpayers' money.
- Ethical: for the way in which the Municipality conducts business aligned with its values.

CAN Refers to the Municipality's installed capacity in terms of:

- Resources, budgets, revenues, grants, and reserves.
- Organizational, skills, knowledge, experience, **AND** people hours

Increasing productivity (making **CAN** bigger) is a managers' priority.

FIGURE 5: Commitments Equation



Ideally, decisions that involve endorsement of new services and new responsibilities should undergo an operational capacity assessment before moving on to project execution, this prevents the possibility of implementation of new solutions that are ignored after rollout and are generally not accepted by municipality employees.



| | |
|-------------------|---|
| Strengths | <ul style="list-style-type: none"> • MNBP consistently achieves a high level of citizen and customer satisfaction thanks to a passionate and committed customer centric culture. • The two departments that are the scope of this project, govern their activities based on crafted professional plans: <ul style="list-style-type: none"> ○ The Asset Management Plan ○ Parks and Recreation Master Plan • The management team is adept at balancing the trade off to time, resources, and work. |
| Weaknesses | <ul style="list-style-type: none"> • The organizational structure is responsive specifically for the delivery of frontline services but does not have an allowance for the skills and capacity required to incorporate new functions and responsibilities, like the development of a social housing policy. • Administrative tasks and projects are handled in combination with business line responsibilities, which at times overwhelms capacity, creates delays in ability to response and some non-emergency but important activities are delayed. • The departments are self-reliant and excel at handling work demands and support each other when required but there is no intentional pursuit of synergies. This has a direct impact on capacity planning and real time management decisions as data is not readily available. |

BENCHMARK 2: Digitalization

Proper use of technology is one of the opportunities MNBP have for increasing capacity (**CAN** in strategic tension) and in combination with process redesign **constitutes the highest return on investment** and the best path towards higher productivity and sustainability.

Technology increases capacity and quality of services delivery through:

- Self-service features thanks to its ability to automate tasks at the transaction level.
- Automated collection, analyses, and report of data as information.
- Readily available data for making management decisions in real time.

A responsive information technology plan follows like a “structured plan” for every action and every decision; in this way a data point for each event is recorded in a database. Data that can be used to analyze outcomes, monitor performance, and model decisions; in short, creates the **I** in IT (information technology).

This is an obligatory assessment to evaluate readiness for implementation of:

- The project’s mandate for an automated booking platform and feasibility
- The feasibility to leverage other technology-based solutions to achieve efficiencies.

Development and implementation of an information strategy is an on-going effort that requires:

- Detailed documentation of processes.
- Clear definition of outcomes.
- Full integration design for all functional components: processes, procedures, and tasks.

Enterprise Architecture is used to:

- Create the integrated design.
- Translate documented processes into business requirements for the identification and selection of technology.
- Align and coordinate processes and technology from tasks at the job level to outputs in the form of services.

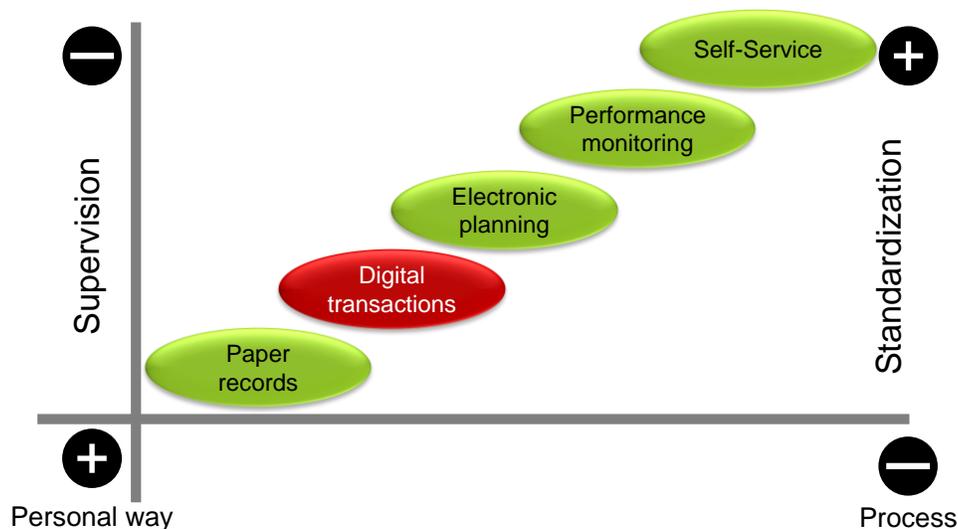
Management systems, are a set of policies and processes, supported by technology, used by an organization to ensure it can fulfill the tasks required to achieve its objectives.

Figure 6 shows the stages of maturity for an organization’s information infrastructure, starting with paper records and progressing to automation in the form of self-service features.

MNBP performs many transactions digitally and although there is opportunity to expand on the use of electronic transactions the greatest opportunity is in full utilization of already available systems and in their integration with daily processes.

It is worth highlighting that MNBP is already in a position to fully digitize its activities. Keystone offers a good core ERP (enterprise resource planning) financial system on to which customer interactions and field maintenance operations can be linked. The upcoming projects from Public Works, to add GPS and water measuring technology will go a long way to optimize and improve required compliance.

FIGURE 6: Digitalization Progression



In addition to the technical aspects of implementing technology, a change management plan is important to ensure users endorse and utilize the new solutions.



| | |
|-------------------|--|
| Strengths | <ul style="list-style-type: none"> • MNBP has implemented technology for all central functions and to support some operational activities, like Keystone for enterprise financials and MESH at Public Works. • MNBP is introducing mobile technology to complement core applications, as is the case of tablets and smart phones for Public Works crews. • Public Works is introducing GPS technology to automate location reference data. |
| Weaknesses | <ul style="list-style-type: none"> • Technology selection lacks specifications to facilitate systems integration. • Project management practices should be introduced to ensure successful adoption of technology. Launch efforts need to be followed with dedicated efforts to ensure full implementation and ongoing adoption of new technologies. • Change management should be incorporated to complement project management efforts and further contribute to ongoing adoption of new technologies. • An enterprise level architecture is necessary to plan for integration, decide on the right sequence of deployments, and develop a comprehensive productivity program founded in self-service and automation features. |

BENCHMARK 3: Operational Management

Operational management is:

- The bridge between the strategic plan and daily activities.
- Concerned with standardizing and simplifying processes.
- Dedicated to management of capacity by working on increasing productivity, setting priorities, and deciding on timelines for each project and responsibility.

Ultimately the purpose of an operational improvement project is to increase capacity through productivity.

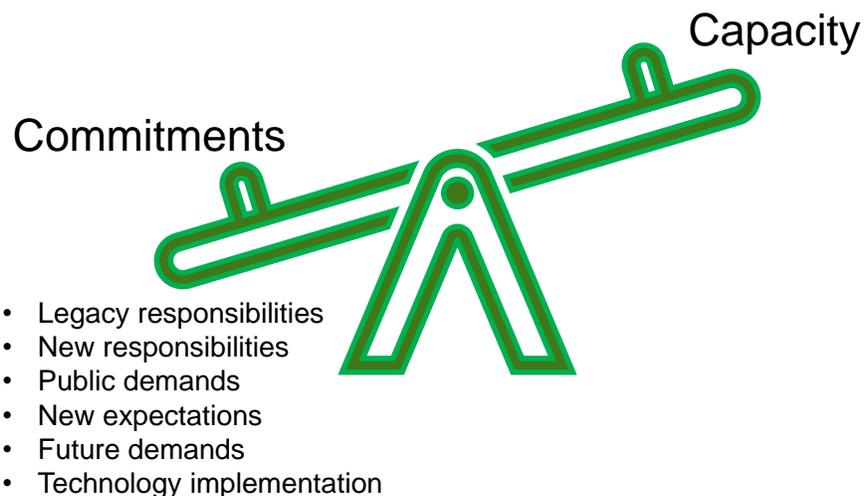
Benchmark 1 is about decision-making and planning of resources. Benchmark 3 is about managing the day-to-day operations and keeping a functional balance between timing, pressures to deliver and the constant stream of new demands.

Additionally, Benchmark 3 is about implementation of continuous improvement to increase productivity, to increase capacity.

Can you answer YES?

- Do I have a process?
- Is my process visual where everyone can monitor status?
- Can I tell when my process has problems?
- Is there a method to raise issues or problems?
- Do I have standardization in my process?
- Is everyone following the standard work in the process? How do I know?
- Do I have and follow a communication process that informs everyone involved?
- Am I measuring the things that I want to improve? How do I know?
- Are my measurement methods visual for all to see?
- Am I using targets and are they visual

FIGURE 7: Capacity Balance





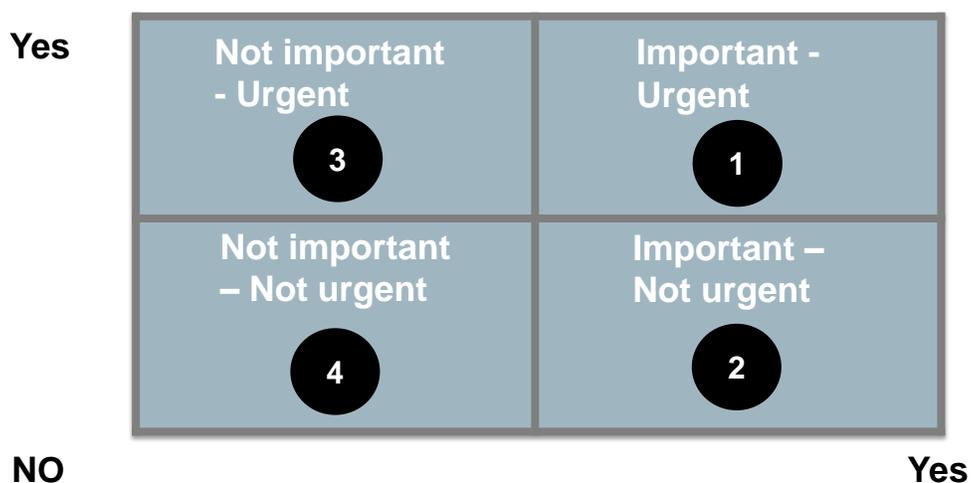
| | |
|-------------------|---|
| Strengths | <ul style="list-style-type: none"> Managers have mastered their front-line portfolios and have hands on experience on how to perform every tasks. Strong supervisory presence at the frontlines. Deep experience at the frontline level and at administrative support. |
| Weaknesses | <ul style="list-style-type: none"> Operational data is not readily available. Performance KPIs are not defined or tracked. Activities are performed without predefine and/or qualitative outcome expectations. There is no feedback protocol. Priority selection and synergy opportunities do not follow a formal pattern. Financial models and/or proforma statements are not used to assess financial impact of decisions to modify service levels and accept new responsibilities. |

BENCHMARK 4: Governance

Governance is about the protocols followed by leaders to bring their teams together, get them on the same page, identify priorities, areas of focus, and join work plans.

This assessment is perhaps the most important element to support implementation of the recommendations in this report. Agreement on the importance of modernization and even the daily toil created by processes that need immediate improvement does not easily translate into action for change. Emergencies, prior commitments, and busy schedules get in the way of finding time to plan and from finding time to execute.

FIGURE 8: Strategy Shaper



Governance seeks a team-based approach for the:

- Identification of priority or key areas.
- Definition of expected outcomes.

- KPIs to measure progress.
- Inventory of activities already ongoing.
- Assessment to whether to continue them.
- Identification of new activities to achieve expected outcomes.

The *structural changes section*, under Standing Committees, has a brief description of the steps to identify and define key areas and for the documentation and tracking of activities per key area.



| | |
|-------------------|--|
| Strengths | <ul style="list-style-type: none"> • Leadership teams' communication lines are open, strong, and consistent. • Leadership team is committed to do the <i>right thing</i> and understands the need for organizational transformation. • Team dynamics ensure regular contacts and information relays. |
| Weaknesses | <ul style="list-style-type: none"> • Formal record keeping of communications and decisions are mostly verbal and paper base, with email the main record keeping tool. • Performance information is developed for specific inquiries and circumstances but not on a regular basis. It is not possible to perform data base lessons learn once memories fade. • Decisions and new commitments are added to the list of each manager, there are no visual representations of outstanding items, resources commitment, or upcoming milestones. • Planning and follow up sessions and meetings are mainly for issue handing instead of regular meetings to develop and agree on join plans, and as follow up and corrective measure sessions. |

Internal Scan

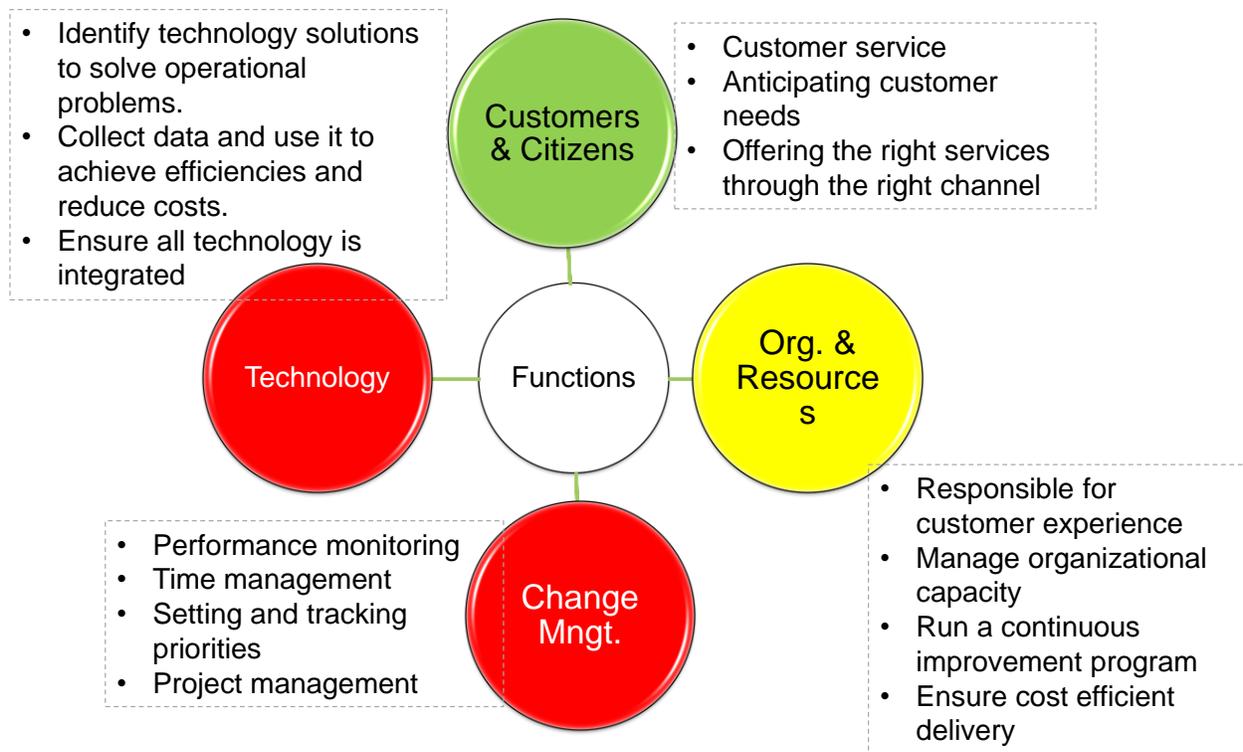
The internal scan analyzes MNBP’s organizational traits, at a functional level.

The *Operational Efficiency Opportunities* section describe actions for MNBP to address the observations from the Internal Scan.

This section reviews MNBP’s readiness to undertake modernization efforts without undue risk to daily operations or the success of the projects needed to achieve the intended changes.

Figure 9 describes the role of each function in service delivery and the summary below describes observations on the gap in MNBP’s service delivery model and highlights aspects that should be addressed as part of the Municipality’s modernization efforts. While all functions need to be addressed simultaneously, the colours represent the level of urgency for action.

FIGURE 9: Service Delivery Functions



Performance Level:

- Good
- Not ready for modernization
- Insufficient to support operations

Citizen & Customers

STATUS



| | |
|----------|---|
| Strength | <ul style="list-style-type: none"> MNBP has a palpable customer-oriented organization, staff makes it a priority to respond to customer inquiries as quickly as possible. Managers have deep front-line experience and field many of the inquiries themselves. |
| Weakness | <ul style="list-style-type: none"> The absence of a CRM (customer resource management) prevents the opportunity to learn from customers' experience and to develop segments profile to improve service/product delivery. The lack of transactional data blocks the opportunity to spot trends, avoid repetitive mistakes, and take corrective actions sooner. |

Organization & Resources

STATUS



| | |
|------------|--|
| Strengths | <ul style="list-style-type: none"> MNBP's managers have a "well-oiled" process to address the issues of the day. Council recognizes the need for additional skills and resources; initial exploration for additional I.T. positions. |
| Weaknesses | <ul style="list-style-type: none"> MNBP operational focus does not account for the new skills required for data analyzes, technology implementation, and standardization of processes. Managers take on the responsibilities for analysis, technology procurements, improvement initiatives while simultaneously coordinating daily activities. Implementation of new technology has not shown strong follow up measures like training and project management to ensure adoption. |

Change Management

STATUS



| | |
|------------|---|
| Strengths | <ul style="list-style-type: none"> Leadership team is aligned on the need for modernization. There are no legacy systems that obstruct introduction of new technology. Municipality already working on adding automation technology to some operations, like water metering and vehicle location. |
| Weaknesses | <ul style="list-style-type: none"> High levels of activity, work volumes are unusually high, which leaves small windows of opportunity to initiate and follow up with improvement initiatives. There is for operational planning, beyond checklist and upcoming activities. Prevalence of paper records or minimum results tracking implies little on-going performance and results monitoring, which might delay implementation of corrective measures and require greater than otherwise necessary efforts. Managers need to focus time and effort to assess results and performance. Managers rely on visual confirmation which is dependent on them having the time to consistently monitor every site. Dependence on paper records decreases frequency and timing of activity reports. Report preparation is an administrative intensive effort. |

Technology

STATUS



| | |
|------------|---|
| Strengths | <ul style="list-style-type: none"> • MNBP already has in place core technology that, with some complementary measures, has the potential to address the need for automated reports and eliminate many of the manual processes still in place. • Software solutions are predominantly Cloud base which eliminates the need for cumbersome and expensive infrastructure and a large IT department. |
| Weaknesses | <ul style="list-style-type: none"> • High levels of activity, work volumes are unusually high, which leaves small windows of opportunity to initiate and follow up with improvement initiatives. • There is for operational planning, beyond checklist and upcoming activities. • Prevalence of paper records or minimum results tracking implies little on-going performance and results monitoring, which might delay implementation of corrective measures and require greater than otherwise necessary efforts. • Managers need to focus time and effort to assess results and performance. Managers rely on visual confirmation which is dependent on them having the time to consistently monitor every site. • Dependence on paper records decreases frequency and timing of activity reports. • Report preparation is an administrative intensive effort. |

Findings

This section describes observations for:

- Municipality not covered in previous sections.
- Public Works based on best practices comparison
- Recreation and Parks based on best practice comparison and technology opportunities.

Municipality

MNBP is experiencing a change in the composition of its core citizenry and thus a change in expectations, services, and delivery mechanisms. At the very least there will be a fragmentation of the needs of the community.

An increase in the number of permanent weekend/seasonal resident taxpayers and potentially a more diverse age demographics, distinct needs, and expectations born from exposure to larger municipalities type services and lack of experience on how to fend by themselves in NBP's environment is already reflecting in the constant demands from developers and requests for new class offerings.

The loss of a homogenous constituency translates into the need for more information, more analysis, more cost-benefit reviews and for managers the need for more time to look after these new requests while at the same time keeping regular activities running smoothly.



Governments at all levels and jurisdictions are embracing open data and the public expects real time access to information, like streets plowed or the route of garbage collection trucks. These trends plus the need for speed and higher productivity without additional FTEs puts higher than usual pressure on MNBP to implement an information strategy for which needs to develop skills and capacity.

The changes on demographic could revive old budget allocation issues, like ensuring at least full cost recovery on services provided to non-residents and even consider a small profit. Costs pressures will require another look at fees and perhaps consider new ones.

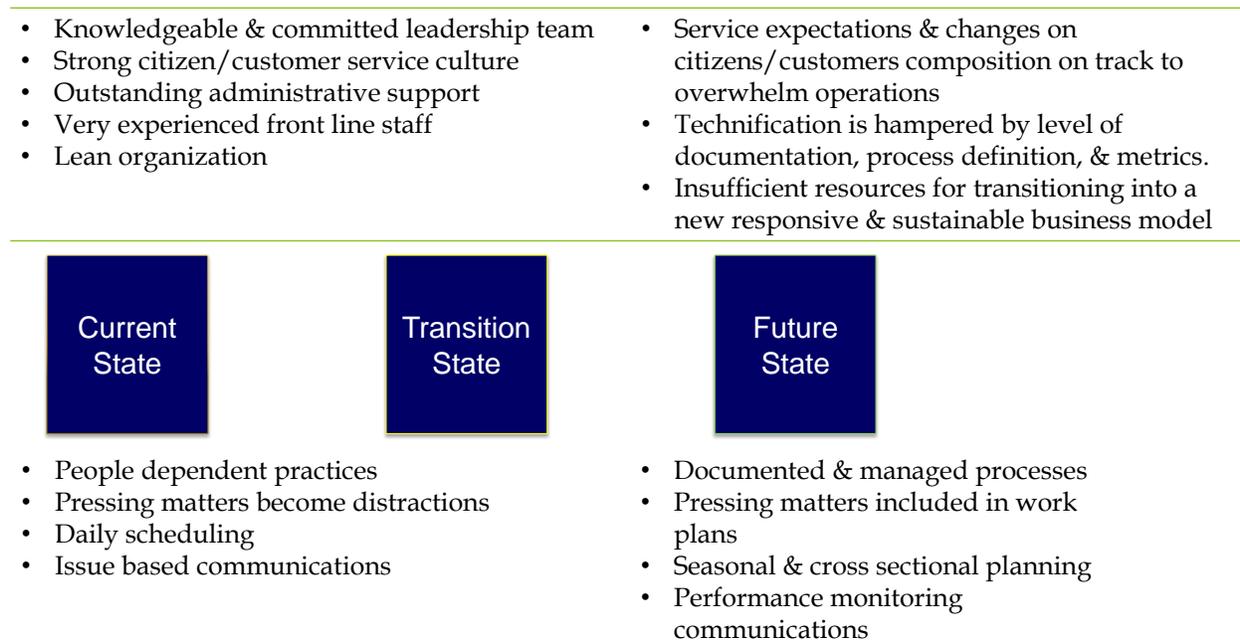
Time, or the lack of it, is the main indicator on the magnitude of the challenges faced by MNBP leadership team. The team and the whole of MNBP get a lot done thanks to experience, high levels of commitment, and hard work.

It is an operational risk to be so dependent on individuals to get things done, it is not a sustainable approach and a concern considering the efforts required to modernize operations and service delivery. Particularly because there will be no break long

enough to implement large projects and there will not be an influx of resources that will allow for an increase on “ready to hit the ground running” FTEs.

The opportunity is, as first order of business, to redirect efforts to implementation of processes and technology that will free up time.

FIGURE 10: Time scale assessment



Public Works Operational Benchmark

The following table list best practices as per research conducted by ICMA (International City/County Management Association) on Public Works activities.

TABLE 3: Public Works Best Practices Comparison

| No | Best Practice | MNBP |
|----|---|---|
| 1 | Time tracking information is available in detail to allow analysis of work practices | <ul style="list-style-type: none"> • Field crews are going to be provided with smart phones or tablets. • Vehicles will be fitted with GPS. |
| 2 | Unscheduled maintenance requires less than 20% of available labour hours | Currently, there is no time tracking and/or standards for jobs. |
| 3 | Predictive maintenance is applied to critical infrastructure | <ul style="list-style-type: none"> • Work is planned according to the seasons. • The budget process and Asset Management Plan assess infrastructure conditions. |
| 4 | A formal quality assurance process is in place and includes review of results and quality | Quality relies in constant visual inspections by supervisor and many by manager. |

| No | Best Practice | MNBP |
|----|---|--|
| 5 | Existence of formal maintenance work planning and scheduling system | Plans exist in the form of daily lists and work orders entered in electronic format. Field crews depend on daily briefing to learn of their duties and outstanding work. |
| 6 | Defined targets for annual road resurfacing | Part of seasonal work plans. |
| 7 | Sampling program to test water metres accuracy | There are plans to procure new remote tracking meters. |
| 8 | Defined service standards to address complaints, like potholes, signs, etc. | Inquiries and complaints are giving immediate attention. |
| 9 | Compliance w/ service std are measured & results analyze | Limited to materials consumption and visual inspections. |
| 10 | Use of materials and repair practices are defined and standardized | Limited to materials consumption at time of invoice payment authorizations |
| 11 | Costs reviews for time and materials take place at least every quarter | Annual financial audit review. |
| 12 | There are seasonal targets for each service and capital program activities | Full understanding of tasks (not outcomes) to be completed. Field crews would benefit from ongoing feedback and celebration of milestones met. |
| 13 | Reworks as a percentage of total work is less than 2% | Use of MESH could help set and track goals. |
| 14 | A formal plan identifies priorities and challenges and actions to address them | Is mainly in the purview of the Manager. |
| 15 | Policies and procedures are well documented, trained on, and followed. | Training is based on pairing new personnel with experience one and visual supervision. |
| 16 | A Gantt chart schedule is available for a 2-to-3-year horizon | Long-term views, rely on experience from previous years. |
| 17 | Project management practices and an automated system is used to manage projects | Assignments are the purview of the Supervisor based on deep experience but without performance tracking and reliance on paper base communications there is little opportunity to spot trends and for process improvements. |
| 18 | A long-term IT plan has been prepared inclusive of applications and IoT | The Manager is leading the introduction of new technology but unfortunately these new initiatives are not integrated with current technology based on MESH. |

| No | Best Practice | MNBP |
|----|---|--|
| 19 | A one stop system for submittal of development service applications | MESH is a system with great potential, but additional steps are required to take full advantage of its capabilities. |

The department has a good management team led by the Manager, a very experience Supervisor, and a highly qualified administrative agent.

Recreation and Parks Operational Benchmark

TABLE 4: Recreation & Parks Best Practices Comparison

| No | Best Practice | MNBP |
|----|---|--|
| 1 | Time tracking information is available in detail to allow analysis of work practices | The department needs electronic means to track administrative tasks, projects, and maintenance activities. |
| 2 | Unscheduled maintenance requires less than 20% of available labour hours | There is a need for a structured program other than analysis performed for the budget process. |
| 3 | Predictive maintenance is applied to critical infrastructure | Based on budget process and asset management plan |
| 4 | A formal quality assurance process is in place and includes review of results and quality | Main rectification approach is on failure or based on timetables of last and next repair. |
| 5 | Existence of formal maintenance work planning and scheduling system | Based on supervisors' experience. |
| 6 | Defined targets for annual maintenance | Based on supervisors' experience. |
| 7 | Structured visual inspections for sites, marinas, and halls | Based on supervisors' experience. |
| 8 | Defined service standards to address complaints | Customer complaints are giving top priority and when applicable handled on site. |
| 9 | Compliance w/ service std are measured & results analyze | Services are delivered as possible as possible and as well as possible |
| 10 | Service Experience plan is in place | Frontline staff, particularly at the marina and campsites, would benefit from well-defined customer commitments. |
| 11 | Costs reviews for time and materials take place at least every quarter | Dependent on budget reviews and when processing payments |
| 12 | There are seasonal targets for each service and capital program activities | Tasks completion more than outcomes are used to measure progress |

| No | Best Practice | MNBP |
|----|---|---|
| 13 | A formal plan identifies priorities and challenges and actions to address them | Based on previous year experiences. |
| 14 | Policies and procedures are well documented, trained on, and followed. | Based on deep experience of the supervisory level |
| 15 | A Gantt chart schedule is available for a 2-to-3-year horizon | Long-term view is informal and dependent on experience |
| 16 | Project management practices and an automated system is used to manage projects | Project management would be extremely helpful as the Manager's Community Services responsibilities will increase and take away time available for Recreation and Parks responsibilities |
| 17 | A long-term IT plan has been prepared inclusive of applications and IoT | Technology identification and implementation would make the largest improvement on efficiencies and consistency AND should be paired with change management practices |
| 18 | A one stop system for submittal of development service applications | The introduction of an automated booking platform will satisfy this requirement. |

Recommendations

This section covers thirty-six (36) recommendations described in two segments:

1. **Structural Changes.** Concerned with the modernization mandate of the project and is based on nineteen (19) recommendations on the adoption of management practices to complement MNBPs' operational strengths by adding tasks that are necessary to "make" time for MNBPs' modernization efforts.

Teams that are pressed for time and "wear too many hats" find it hard to make time outside of the issue of the day; however, while skipping on planning and coordinating tasks might make sense at first, over the long run the absence of these activities become the biggest impediment for change and condemns teams to a perpetual "firefighting" mode.

2. **Operational Efficiency Opportunities.** This segment describes seventeen (17) recommendations intended to modernize service delivery and customer experience at MNBPs.

The use of the programs described under *Structural Changes* will aid in the implementation and adoption of these recommendations.

1. Structural Changes

The general theme on this report is to highlight that MNBPs' way of delivering services, running the Municipality, and facing challenges must change if it is to keep up with the changing demographic profile of its taxpayers, customers' expectations, and changes in its operational environment. This report frames this change, this new way, as transitioning into a learning organization.

Certainly, a selected number of well implemented initiatives would yield benefits in the form of efficiencies through process improvements and/or automation through technology. Seventeen such initiatives are listed and described in the second part of this **recommendations section** under *Operational Efficiency Opportunities*.

This report also points out that the initiative with the highest return on investment is the development and implementation of an Information Systems Management Strategy, which is also the path towards transitioning into a learning organization.

This report proposes to make the implementation of an Information Systems Management Strategy the main driver of MNBPs operational improvements, because readily available information is increasingly necessary to:

- Meet citizens and customers' expectations for access to information, which is the way to earn trust and credibility.
- Deliver services at the lowest possible cost and maximum efficiency.
- Retain and attract talent.
- Increase operational capacity through automation.

- Free managers' time through automated results and performance monitoring.

Information's credibility is dependent on accuracy AND speed of response, accurate information that takes long to deliver is less credible, triggers more scrutiny and more questions than data that is delivered fast.

Credibility is fundamental to prevent the trap of the information paradox:

- There is never enough information.
- Knowledge does not mean action.
- Access to data is not always used to search for facts, instead its used to justify opinions and preferences, hence the seemingly never-ending cycle of answering questions about the same subject, second-guessing of decisions, and a slow decision-making process.
- Forces organizations to spend considerable time and efforts dealing with it.

From a management perspective an information systems management strategy is the answer to:

- Free time dedicated to track and gather data to answer questions and produce reports.
- Monitor performance, which:
 - Is a great moral booster because it makes simple to provide frequent feedback.
 - Makes meaningful plans real, the cliché: "you can improve what you don't measure" is true.
- Speeds up decision-making. In the absence of results and performance monitoring the decision-making process becomes complex as the natural approach is to explore every angle and every possibility, with the aim of assessing and mitigating risks, fear of making the wrong decision slows the process down and at times is a major disincentive to consider and start improvement opportunities.

An automated results and performance monitoring system allows for experimentation and prevents futile analyses because time and efforts is redirected to define desired outcomes and instead of trying to select the "perfect" answer, every option cannot be tried out, if renders the expected results problem solve, if not then the team can try the next one and so on; most likely the selected option is a combination that now are possible courses of action and not positions to be negotiated on. This is the advantage of the ability to monitor results and performance.

THE QUESTION IS:

Given current time demands, budget pressures, skills set, and organizational chart configuration, how can MNBP implement an Information Systems Management Strategy?

... AND THE ANSWER IS:

The remainder of this section describes the steps to adopt management practices that create the conditions to simultaneously manage daily responsibilities and implement an ISM (Information Systems Management) strategy.

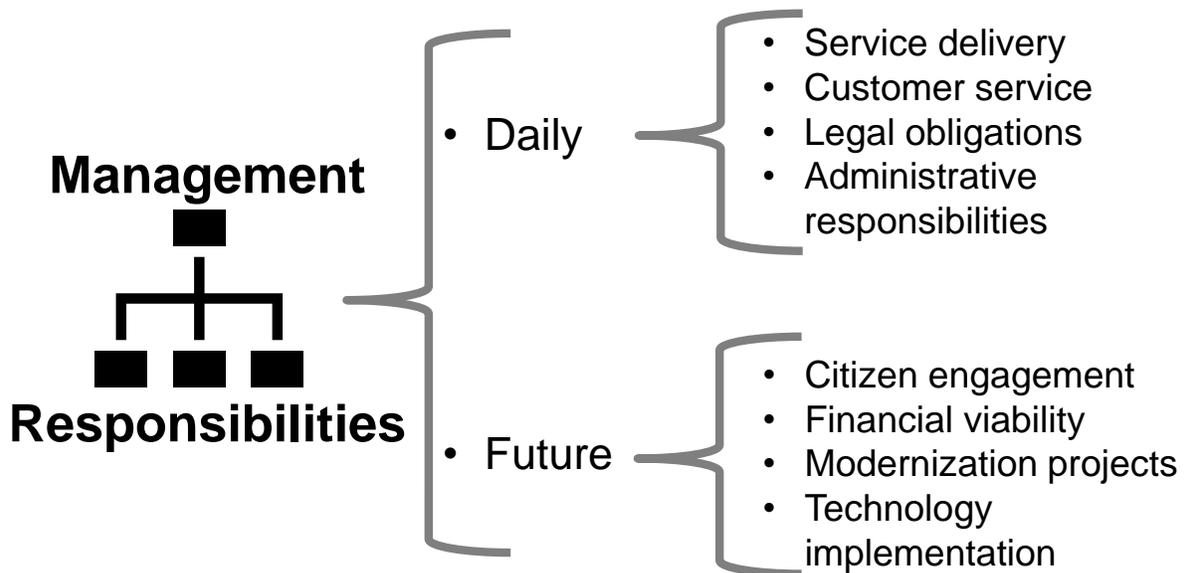
1.1. Formalize a process to accept new commitments

“Insanity, doing the same things over and over again, and expecting different results.”
 Albert Einstein

Figure 7 provides a graphical definition for municipal commitments, which are the sum of all promises made by a municipality to its citizens, customers, employees, and public and governmental agencies. A commitment encapsules both the delivered outcome and the activities performed to deliver it.

MNBP’s annual budget is where all known commitments are captured.

FIGURE 11: Management Responsibilities



MNBP’s efforts, time, and resources are dedicated to meet its commitments to the best of their abilities. The challenge for MNBP’s senior leadership team is to also deal with the commitments that are unknown at budget time, which deviate time from modernization efforts, although important come second to daily responsibilities and evaluation of new commitments.

Continuous improvement are management methodologies used by municipalities to expand management’s ability to handle new requests i.e., commitments, while maintaining modernization efforts as a priority.

The goal of continuous improvement, in all its “shapes and forms:” Quality Control, Six Sigma, Lean, etc., is for the difference between actuals and budget be as closed to zero as possible, which, would mean that all assumptions, estimates, even biases, panned out correctly.

Factories, where the concept was pioneered, use continuous improvement to ensure:

- Production rate be sustained
- Costs remain within calculate range
- Defects be almost non-existent, and
- Constantly, search for improvement to decrease cost, increase output, and further minimize defects.

Continuous Improvement has proven to be so effective that it is now a standard practice at service-oriented organizations like hospitals and municipalities.

The political environment in which a municipality operates is quite different from a factory floor, where every task is methodically scripted.

Variance is the difference between an ideal and actual situation.

It is possible, however, to use factory floor techniques to identify and control variances. Variance in a municipal context are the new projects, and activities that were not contemplated at budget time when commitments were made for next year’s workplan.

The adoption of a **commitment management framework** is the starting point of a municipal continuous improvement program. Commitment management is a join process facilitated by MNBP’s senior leadership team and led by Council.

The term commitment is used to describe the allotment of time to specific tasks and projects. Ultimately, MNBP’s real currency is time and the availability of time is what determines its capacity (and its limitations) to deliver services and performed the associated administrative and legal tasks.

The process is meant to administer capacity, as measured in people hours, to ensure time is used on MNBP’s priorities and, to the extent that it is feasible, prevent time and attention from being used by activities that does not contribute to MNBP’s operational goals: to deliver committed services AND improve operational efficiency.

Lack of progress in modernization is explained by one, or a combination, of the following reasons:

| Reason | Cause |
|---------------|--|
| Too much work | <ol style="list-style-type: none"> 1. Being consistently too optimistic in thinking things will take less time and effort than they do. 2. Taking on too many responsibilities without prioritization. 3. Real surprise – this is normal and acceptable but only for short periods of time. |

| | |
|---------------------------------|---|
| | 4. That “time of the year” scenario – also normal and acceptable for short periods of time. |
| Not enough resources | 5. Being diverted to one of causes #1 and #2. 6. Temporary situation because of causes #3 or #4. 7. Misalignment between formally assigned responsibilities and allotted resources. |
| Frequent unexpected assignments | 8. Nature of the job. 9. Time to reset and/or realign service expectations. |
| Lack of a plan | 10. Blindsided by: <ul style="list-style-type: none"> • Don’t need one, “we” already know what to do. • “Too simple” to bother. 11. Need coaching to prepare one. 12. Assignment consists of new tasks for which leader has little or no experience. |

A simple test to measure the impact of unplanned events, at the beginning of a month each team member:

1. Write down two or three activities related to modernization efforts or any other effort that is not related to daily operations.
2. Stuff the list in an envelope and hand it over to a peer.
3. Review at the end of the month whether the activities took place as planned and if the desired outcomes were produced.

The test assesses the magnitude and frequency of time stealers and determines the efforts necessary to track progress: how easy? what challenges? what can be done differently? Where the outcomes good? Sustainable?

A disciplined approach through commitment management, described by figure 12, is the best path towards making meaningful and sustainable progress in modernization projects. Commitment management is meant to replace the practice of being driven by customers’ demands to one that is driven by goals, as per annual plan and budget.

A mature commitments management framework would allow MNBP’s senior leadership team, in representation of Council’s priorities, quickly determine if an unanticipated request for a new commitment should be considered and when or can it be declined based on its little contribution to MNBP’s goals.

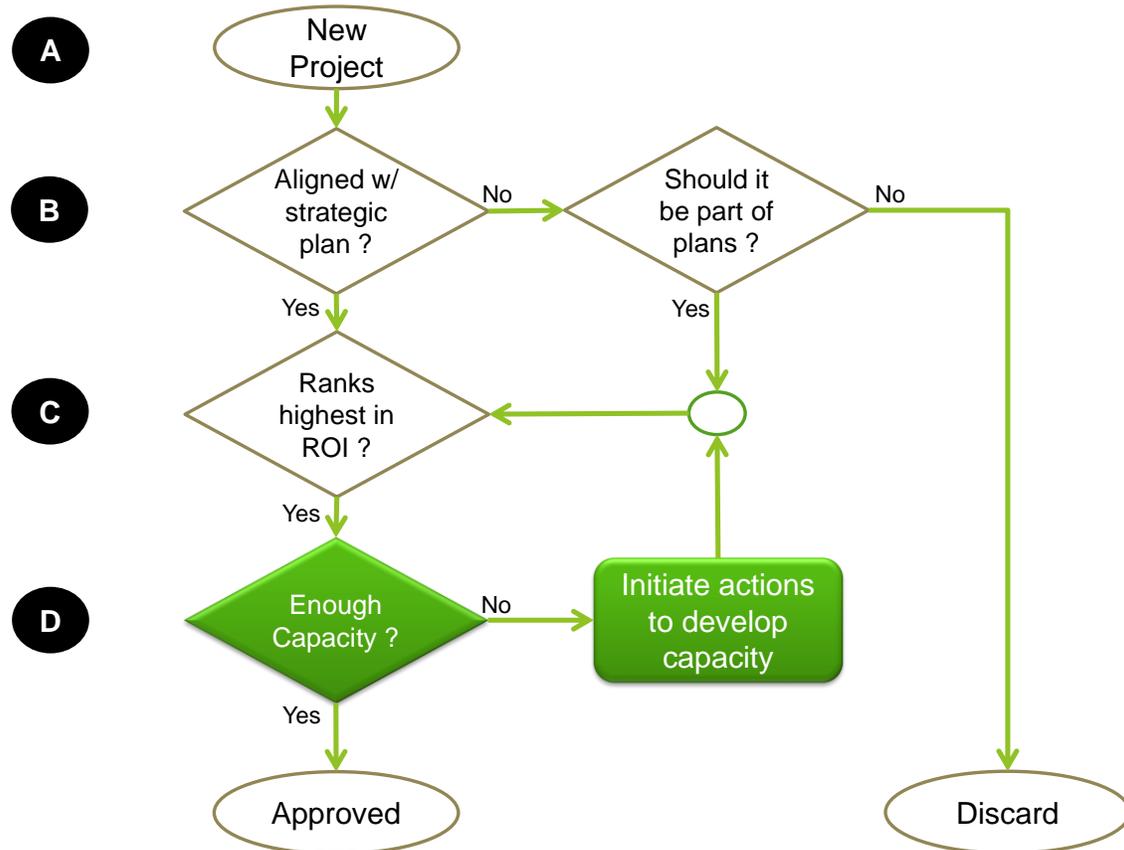
A commitment management framework requires an inventory of current services and activities performed to deliver them, and an understanding of available capacity.

As much as the framework seeks to empower a municipality to decline requests, reality dictates that even with a strategic plan the result of extensive public consultations, almost all requests need to be entertained and without an information systems management strategy the efforts made to evaluate each feasibility could be onerous.

The initial goals of a commitment management framework are to:

- Create awareness of MNBP’s capacity and the importance to quantify and measure it.
- Influence the timing of new commitments based on available capacity.

FIGURE 12: New Commitments Acceptance Process



- A** New projects are all new: requests, customers’ demands, improvement projects, modernization opportunities, legal obligations, and employees’ needs.
- B** To be considered only if:
 - a. New project makes a definite contribution to already approved Municipal strategy.
 - b. New project review reveals that although the project is not considered in the Municipal strategy, it should be due to changing conditions.
- C** Determine level of contribution to Municipal strategy to inform timing of execution.

D

Assess ability to start project by deciding when to calendarize activities.

Options are:

- a. Right away.
- b. Postponed with predetermine timeline.
- c. Postponed with a set of milestones to be met before new project is scheduled to commence.

One of the milestones could be achieving proper project resourcing.

RECOMMENDATIONS:



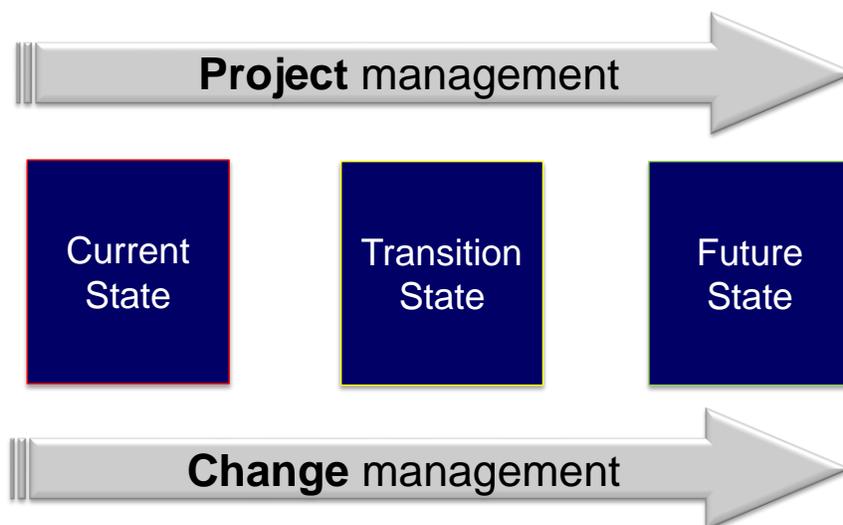
1. Start a log to record the amount of time required to evaluate each new request.
2. Factor the impact of dedicating time to evaluate new requests on available capacity.
3. Provide regular updates to Council.

1.2. Incorporate change management into every project

The value of technology depends on what an organization accomplishes with it. If after a well-managed project of selection, implementation, and roll out technology is not embraced and used by staff then the value of technology is low.

While there are technological solutions to address many of MNBPs challenges, the efforts and money spend on buying and implementing a technological solution will not deliver its full value until the human side of change is factored in. It is best to incorporate change management right from the beginning at the stage of problem/opportunity definition.

MNBP has valuable examples to learn from on the challenges faced when introducing new technological solutions and/or changes to practices. Instructions and not even a training program are enough to ensure users embrace the new solution and change their regular practices.

FIGURE 13: Change Management Stages

The lost opportunities from incomplete or failed roll outs are multiple, from the unfortunate precedence of building and not using, to not benefitting from new available functionality, to the ongoing efforts that continue to be applied unnecessarily to compensate for inefficient practices.

All changes have/require the following components:

- Knowledge of operational realities, which includes expected results and challenges faced to deliver on them. Front-line, operational knowledge is one of MNBP's greatest strengths.
- Clear definition of expected outcomes, with timeline and a quantifiable manner to monitor progress.
- Resources to design, develop, train, launch, and support projects.
- Monitor and coach use of new solution.

The cornerstone of a successful change is teamwork and teamwork success, is dependent on the timing and level of engagement from those impacted by the change on the desing of the new solution.

While it is not always possible to engage all stakeholders on the decision(s) that lead to Council endorsement and budget approval using written statements for all involved to be in the same page is a simple and yet powerful tool to provide a tangible medium to get stakeholders to understand the issue at hand in as similar away as possible and most importantly agree on the way to make the change happens. It is through engagement on the implementation plan that stakeholders can see that their concerns are heard.

RECOMMENDATIONS:

| | |
|---|---|
|  | <p>4. Consider have a MNBP staff certified in ADKAR, from Prosci, OR follow a practitioners’ approach, by which an ADKAR certified consultant is retained to coach a project team on the use of the methodology, a “train the trainer” approach, this way Municipal staff gets to learn the methodology by practicing it.</p> <p>A good exercise would be to complete the implementation of MESH at Public Works.</p> |
|---|---|

1.3. Follow project resource planning practices

Resource Planning, the section of a project plan used to specify the exact quantities of labour, equipment, and materials needed to complete a project.

Managers and their teams should, as much as possible, be part of the decision process leading to a new project and certainly must be part of the requirements and design phases since their operational expertise makes them ideal sources of information and, more important, validators of the practicality of a new solution.

Ideally all participants in a project would have formal project training. Project Management is at its core a practitioners’ skill; at times project management methodology is too dogmatic but where formal project management training is particularly useful is with its resourcing plan.

One of the main reasons for project delays and often failure is insufficient and/or incomplete resourcing, which should include resources to carry out the work and perhaps more importantly resources to manage the project.

With already terribly busy days it is too much to expect that managers be also project managers and lead new initiatives, the role of project management and related activities is a fulltime job in itself.

Manager support as sponsors is crucial for project success and when necessary as a project resource for validation and as facilitator to aid in decision-making and stick handle activities that require cooperation from other departments and/or from vendors.

FIGURE 14: Managers Responsibilities



The conclusion of this section is to start work on a new initiative only after it is properly resourced. In circumstances in which a delay is not an option then consideration should be given to stopping an already ongoing initiative/project.

This type of trade-offs happens already, made individually by every team; this report recommends that they be made in the form of a report that can be tracked periodically.

Well scoped projects allow for time-controlled engagements, budget permitting, and be based on predetermined milestones.

RECOMMENDATIONS:

| | |
|---|---|
|  | <p>5. Introduce a roster prequalified services in the skills required for successful project execution, in a manner that is flexible and responsive to specific needs.</p> <ul style="list-style-type: none"> • Write business cases • Project plans • Business process redesign • Conduct RFPs up to contract award • Data analytics • Training • System support and administration • Etc. <p>6. Assign a budget to the roster; to be used on a first come, first serve basis.</p> |
|---|---|

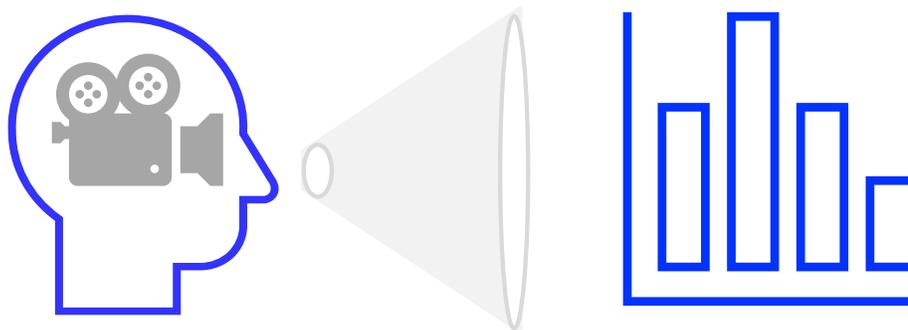
1.4. Standing Committees

Standing Committees is a team and time management approach for teams with too many top priorities and whose members “wear many hats at once.”

It is a good way to create awareness of all that is going on and navigate through distractions to:

- Get out of “firefighting” mode and into a coordinated approach towards a semblance of control.
- Focus on achieving goals rather than fixing problems.
- Switch from catching up to building up.

FIGURE 15: Data Visualization



Standing committees work based on the principle of visibility by providing an avenue:

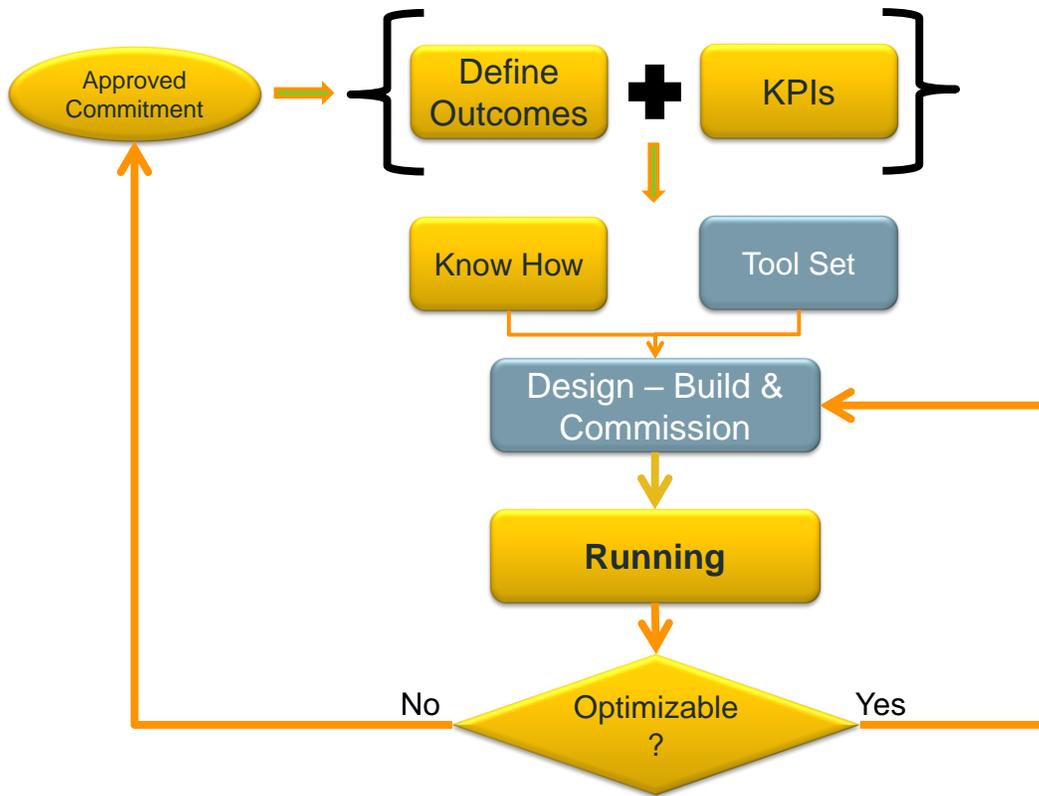
1. To list ALL the activities each team member is involved in.

This prevents the issue of adding new responsibilities and leaving it up to each team member to figure out how to juggle their frontline business responsibilities with those of a management AND as a member of the leadership team. Having a comprehensive and centralized list creates the possibility for tasks to be taken on by other managers even if not related to their direct responsibilities, a truly team-based approach at managing all responsibilities. Also, to the extent that is possible, prevents taking on new commitments when more pressing ones are still on the works.

2. To capture all team members interest and issues they are confronting presently.
3. To apply the action condition, which is to facilitate a team-based agreement that:
 - a. There is a problem
 - b. The definition of the problem
 - c. That something needs to be done about the problem
 - d. The options available to tackle the problem
 - e. On selected course of action

- f. On when to act
4. To highlight the expertise already available within the team. Figure 16 describes the sequence of activities required for execution of an approved project. The grey shaded boxes are the only ones for which, perhaps, MNBP needs help in the form of additional knowledge and skills, and time by supplying resources. At times it may be desirable to outsource even when MNBP has the inhouse expertise.

FIGURE 16: Where help might be required



MS Planner is an ideal tool to run standing committees.

The following steps describe the process for standing committees:

A.

Identify the main areas of interest or key areas. No need to over think these categories, if possible, limit their number and keep in mind that it is possible to replace the key areas over time while making others permanent.

For example:

- Technology
- Recruitment
- Facilities
- Budget
- Process improvement

- Etc.

Each key area becomes a standing committee.

B.

Define a desired outcome for each key area. The leadership team needs to have agreement on the key areas and on these statements.

It is important to see yourself reflected and to make it realistic / achievable.

Conditions and requirements assessment: Must be in place before implementation.

C.

Identify which resources (time, skills, etc.) are required for action to be implemented and successfully adopted.

D.

Plan for the necessary activities to address the needs, conditions, and requirements.

Time base planning: Sequence is important

E.

List all the activities that are already going on for the key area.

Assess if there is need for coordination and if it matters the order in which activities are completed.

If there is need for coordination and the sequence matters, take corrective actions.

F.

Leverage MS Planner and follow simplified project management protocol to define a plan, timelines, assign responsibilities and track progress.

G.

Ensure time is assigned not only to meet on the projects but also time to work on them.

H.

Consolidate all the information in a template:

FIGURE 17: Key Area Template

| | | |
|---|---|---|
| Key Area: | Technology | |
| Outcomes: | Short – Term: | Implement an Information Systems Management Strategy |
| | Long – Term: | Leverage already available technology |
| Requirements: | <ul style="list-style-type: none"> • Documented processes & procedures • Business requirements • Technical specifications • Project management skills | KPI(s): Number of processes mapped. |
| Previous Activities: <ul style="list-style-type: none"> • RFP for GPS • RFP for water billing • New web site | | PMR: |
| New Projects: <ol style="list-style-type: none"> 1. Use MESH to assign and track workorders at Recreation and Parks 2. Implement electronic time sheets 3. Implement a booking platform that allows self registration and collect payment | PMR: | Timeline: Q2 2021 Q3 2021 Q4 2021 |

I. Consolidate all new projects, assess capacity, assign priority level, and schedule them accordingly.

RECOMMENDATIONS:

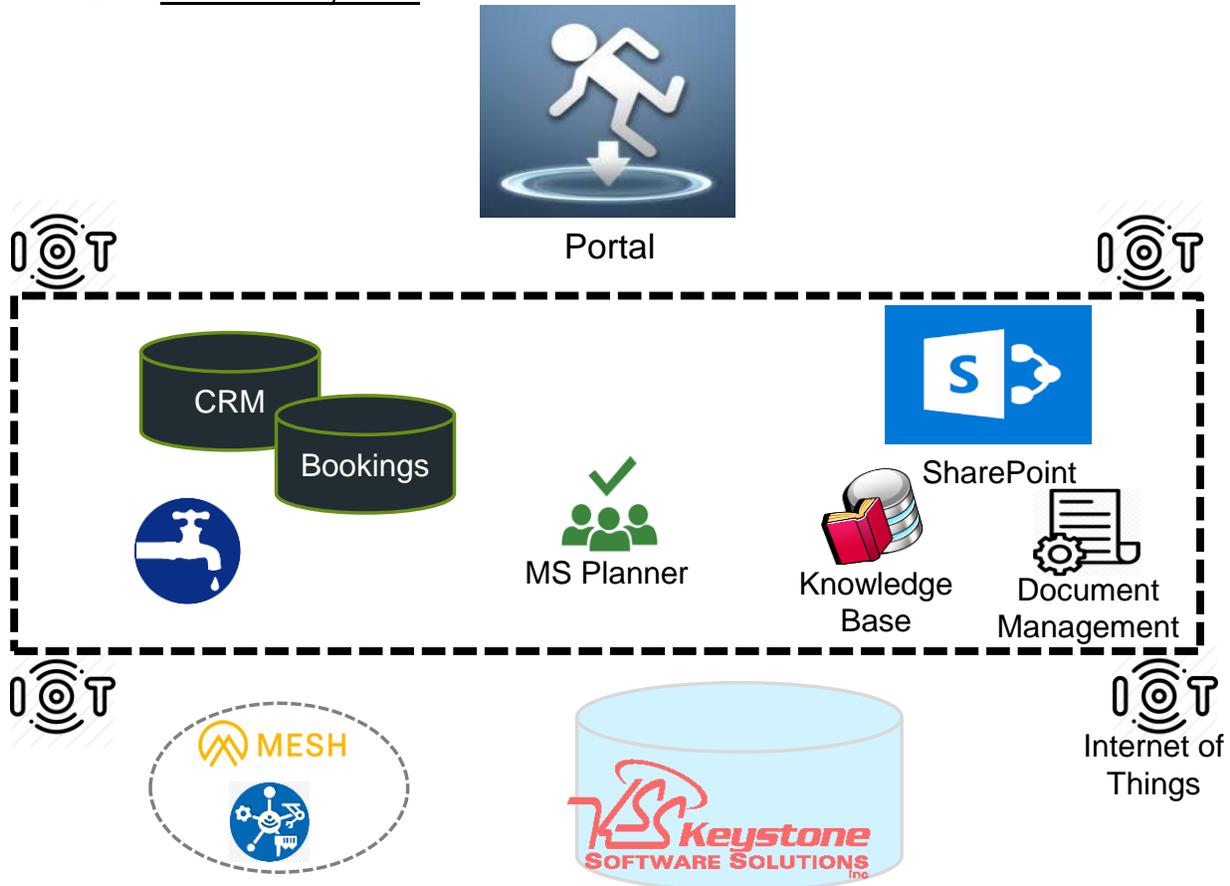
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|  | <ol style="list-style-type: none"> 7. Develop a template for each key area. 8. Update each template regularly: progress made, KPIs, and new activities. |
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1.5. IT Framework

The network effect is a major driver for systems integration. This recommendation seeks to substantiate the need for Enterprise Architecture in MNBP future IT initiatives to maximize investments and track – “shadow” – every action and every decision in easy to retrieve and use databases.

MNBP has many of the core elements required to leverage current software like Keystone and MESH and bring new cloud base applications to complement customer service with self-service features, automate performance monitoring, and data analytics.

FIGURE 18: MNBP's IT Systems



MNBP's gaps and areas of concern for the implementation of technology are:

Enterprise Architecture

- Future procurement of technology should consider existing technology to:
 - Integrate systems, e.g., the RFP for GPS and AVL (automatic vehicle location) should include integration with MESH.
 - Make implementation easier, e.g., the RFP for digital water meter should consider the vendors with which Keystone have ready-made interfaces.
- Seek applications that allow self-service and, when possible, end-to-end automation.

Data Collection

- Data collection is one of MNBP's weakest traits.
- Data collection should be a priority and collected by inputting daily results and activities in MS Excel.
- Work with frontline staff to make them responsible for collecting and reporting their activities.
- Figure 19 highlights MNBP's data gaps, which point out at the limitations to analyze results and become more efficient.

Use of Information The deep understanding and, in many circumstances, extensive experience seems to obviate the need for information but there is an over reliance on personal judgement which impedes communication and the ability to spot trends.

FIGURE 19: MNBP’s Data Management Gap

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|  Customers | Interaction | Application |
| | • Inquiry | CRM |
| | • Complaint | CRM |
| | • Service Request | Digital Booking Platform |
| | • Billing (taxes, water) | Keystone + CRM |
|  Employees | Interaction | Application |
| | • Time & Attendance | MESH time sheets |
| | • Vacation & Absences | HRM |
| | • Payroll | Easy Pay |
|  Asset Mgt | Interaction | Application |
| | • Inventory | MESH & Keystone |
| | • Conditions | Asset Mgt Admin |
| | • Maintenance | MESH |
|  Data | Interaction | Application |
| | • Databases | CRM + Bookings + Keystone + Easy Pay + HCM |
| | • Modeling | Power BI |
| | • Dashboards | Power Bi |

RECOMMENDATIONS:

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|  | <p>9. Future RFPs must factor integration with current technology.</p> <p>10. Future technology implementation projects should consider system’s commissioning and a roll out monitoring phase to ensure solution is being used.</p> <p>11. Prioritize the use of current technology, particularly when it is possible to replace manual process with technology already available.</p> <p>12. Establish a process documentation program. Initiate with an inventory of all processes and follow up with a commitment to map at least two processes a month.</p> |
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| | <p>13. Collect data. Identify MNBP's key metrics and incorporate data collection as part of daily responsibilities throughout the organization, start by questions ask by Council and/or the public frequently that usually take time to answer.</p> |
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2. Operational Efficiency Opportunities

The previous segment, **structural changes**, described nineteen (19) recommendations.

This section briefly describes seventeen (17) recommendations of mostly operational nature that once implemented will:

- Free staff time through the implementation of self-service features and automation of data collection.
- Improve communication among teams by making data readily available.
- Recognize good performance by tracking daily activities.
- Aid in the automation of data collection
- Increase quality in service delivery through technology that quickens response times in services and addressing inquiries.

These recommendations also set the foundation for the roll out of a **continuous improvement program** and the first steps towards implementation of an **information systems management strategy**.

Should the Municipality of Northern Bruce Peninsula implement these recommendations they will experience a cost savings to operations of approximately \$142,000.00 per year. This is based upon not requiring to hire two additional support staff.

2.1. Digital Booking Platform

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| Recommendation #20 | <p>Implement a digital booking platform with full self-service capabilities including payment acceptance.</p> <p>Business Requirements should include the following features:</p> <ul style="list-style-type: none"> • Facility Reservation & Scheduling, through a platform capable of handling contract management, recurring bookings, and capacity management. • Online link to MNBP’s website to allow 24/7 information sharing and registration. • Facility maps, in addition to provide descriptions of services, options, and programs, be able to provide maps and diagrams for campgrounds and marina. • Attendance tracking and check-in, to allow customers to scan themselves in at the front desk with automated gate access. Manual check-in with staff should remain an option through the system. • Document management should comply with information privacy legislation AND manage sign and share wavers, |
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| | <p>contracts, proof of insurance, and other documents and store them in relation to customer account and event.</p> <ul style="list-style-type: none"> • Account management with built-in marketing and communication emails plus business intelligence to generate better understanding of seasonal performance and customers' experience. • Advance custom booking with schedule tracking and reporting with dynamic updates to allow for 24/7 self-service registration and payment processing. • POS & Store Management, to sell any product, service, or event online or on location. • Task Management, to send automatic messages to front desks and / or Marina and Camp Site with reminders and instructions. • Staff & Resource Management, to have a full view in one calendar of all staff resources as related to customer support activities. |
| <p>Recommendation #21</p> | <p>Use the booking application when processing walk-in and / or phone requests.</p> <p>The platform should be used by staff to enter and process all service requests.</p> <p>Instead of the current manual processes, staff should enter and process directly into the application, link the appropriate account, but using a code to identify that the request was entered by staff.</p> |
| <p>Current Situation</p> | <p>Registrations are processed mostly over the phone or when a customer attends/arrives personally.</p> <p>Not all requirements (e.g., insurance at the Marina) are met at time of booking and on occasion there is no follow up afterwards.</p> <p>Priority is given to accommodate all requests but there is not enough attention (or opportunity) to gather customer information.</p> |
| <p>Benefits</p> | <ul style="list-style-type: none"> • Ensure all reservations are paid. • Free up significant time used to take calls, answer questions, and book customers. • Create a profile on customers by season and by service, which will inform opportunities for improvement and selection of amenities based on demographics, |

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| | type of services requested, length of time, identification of repeat customers, etc. |
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As part of the activities of the project, a product demonstration was conducted to review options. Perfect Mind was identified as best in class and selected as benchmark produce / service.

This product can manage water billings through its payment processing and automated email features.

2.2. Implement CRM (customer resource management)

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| Recommendation #22 | <p>Extend the functionality of the digital booking platform to double up as a CRM (customer resource management) to add account management to all citizen and customer interactions.</p> <p>The selected digital booking platform comes with a CRM function. Use this function for all citizen and / or customer contacts.</p> |
| Current Situation | <p>Customer contacts are not centrally recorded and tracked.</p> <p>Keystone has a CRM module not in use by MNBP.</p> |
| Benefits | <p>Allow a “one stop shop” for all citizen/customer activities, tax bills, water bills, inquiries, complaints, etc.</p> |

2.3. MESH for Recreation and Parks

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| Recommendation #23 | <p>Add Recreation and Parks maintenance activities to MESH database.</p> <p>Recreation and Parks needs an application to manage its maintenance responsibilities by issuing and tracking work orders. MESH is already set up for similar functions for Public Works.</p> <p>The use of MESH as Recreation and Parks can be arranged through an extension of current user agreement.</p> |
| Current Situation | <p>All Recreation and Parks maintenance activities are performed manually.</p> <p>Tracking progress is labour intensive and so is keeping records of asset conditions and work carried out.</p> |

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| Benefits | <p>This is a simple extension project that will immediately:</p> <ul style="list-style-type: none"> • Provide work scheduling and work order issuance capabilities. • Create electronic checklists for every tasks. • Have a location to record materials checklists and log consumption rates. • Track progress and productivity. |
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2.4. Link MESH to Smart Phones / Tablets

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| Recommendation #24 | <p>Link the Public Works field crews' smart phones / tablets to MESH's location capabilities.</p> <p>The MESH application can be linked to smart phones and tablets and by taking advantage of the GPS in the devices is capable to geo-locate where activities took place, connecting location, time travel, and stay duration to work orders.</p> |
| Recommendation #25 | <p>Link the Recreation and Parks crews' smart phones / tablets to MESH's location capabilities.</p> <p>This will provide automated time tracking capabilities linked to work orders.</p> |
| Current Situation | <p>Geo-location is not tracked and when required needs to be assembled "manually" and through a labour-intensive exercise of reconstructing activities for any given day, retrieving work orders and figuring out location of the job.</p> |
| Benefits | <p>Is a simple project that creates a reliable data set for all maintenance activities to:</p> <ul style="list-style-type: none"> ○ Monitor performance ○ Analyze productivity ○ Create a dashboard <p>Plus, all the information can be displayed on a map and all activities can be day and time stamped.</p> |

2.5. Automated Time Sheets

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| Recommendation #26 | <p>Add MESH's time sheet module for Public Works.</p> <p>Time tracking is a module in MESH's suite of options that is integrated to the core work orders functionality.</p> |
| Recommendation #27 | <p>Add MESH's time sheet module for Recreation and Parks.</p> |
| Current Situation | <p>Recording time and attendance is a labour-intensive process:</p> <ul style="list-style-type: none"> • First time is recorded by each employee. • All individuals' information is consolidated into a master sheet. • The master sheet is approved by Supervisor. • Approved sheets are sent to payroll at City Hall. • The sheets are codified, and calculations are performed as necessary to determine final pay. |
| Benefits | <p>This additional feature will reduce the amount of work related to recording and approving time and attendance AND will provide more accurate and complete information as time, day and work orders will be registered together.</p> <p>This information will be invaluable to assess productivity and determine job standards.</p> |

2.6. Work Orders Process

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| Recommendation #28 | <p>Formalize the work order scheduling, tracking, and closure processes.</p> <p>The processes should be standardized and take full advantage of all the application's functionality and the link to mobile devices.</p> |
| Current Situation | <p>The system is ready and fully set up but scheduling and work assignment remains mostly a manual exercise, with progress still to be made on closing open work orders.</p> |
| Benefits | <p>Role clarity for Manager, Supervisor and Administrative support will free up time and ensure consistency.</p> <p>The use of the system:</p> <ul style="list-style-type: none"> • Creates a data set of all work orders |

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| | <ul style="list-style-type: none"> • Allows to monitor performance and provide opportunities to recognize employees. • Starts the opportunities of data analytics and determine job standards. |
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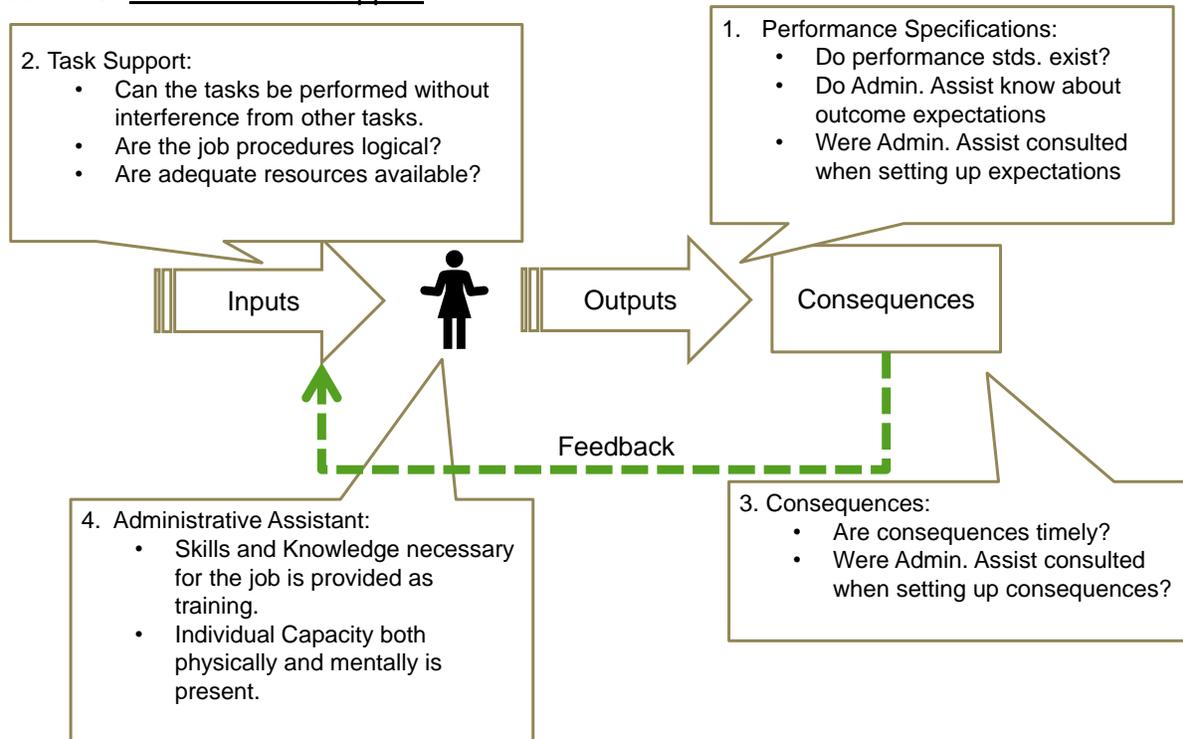
2.7. Field Dashboard

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| Recommendation #29 | <p>Install a large monitor to report on daily activities and open work orders that is accessible to all staff.</p> <p>Create a dashboard with current and open orders for the whole Public Works team to see.</p> |
| Current Situation | <p>There is no real time feedback and new assignments given after the beginning of the shift are mostly provided verbally, will little in the way of electronic records.</p> |
| Benefits | <p>The screen empowers team members and when paired with the ability to self-assign jobs and close them frees up time for the Supervisor and Administrative Assistant.</p> |

2.8. Empowerment

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| Recommendation #30 | <p>Structure work to empower administrative assistant jobs.</p> <p>MNBP has a group of outstanding administrative assistants that have deep knowledge and understanding of MNBP's procedures, requirements, and know-how.</p> <p>Administrative assistants' ability to contribute can be increased through:</p> <ul style="list-style-type: none"> • Job clarity • Process design to ensure Assistants are involved only in value-add activities and as little as possible to compensate for compliance failures somewhere else in the process. |
| Current Situation | <p>Administrative Assistants cover a wide range of activities and some of their time is assigned to manage labour intensive jobs (e.g., time and attendance tracking) and to compensate for lower than necessary performance at other segments of the value chain process.</p> |
| Benefits | <ul style="list-style-type: none"> • Processes standardization. • Higher productivity. |

FIGURE 20: Administrative Support



2.9. Measure Results and Performance

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| <p>Recommendation #31</p> | <p>Define and track KPI (key performance indicators) to monitor results and performance.</p> <p>Measuring results and performance in an automated fashion generates two important benefits:</p> <ol style="list-style-type: none"> Improves team members morale. Regular feedback goes a long way on signalling staff that the Municipality appreciates their ongoing efforts. Because of hectic schedules and regular pressures most conversations are triggered around a problem that needs fixing. Working relationships between teams and supervisors are good but it is always welcomed to receive feedback on performance. “Makes” managers time. Collating data and formalizing reports is a time-consuming effort. Not knowing the answer to a customer inquiry, a member of Council, or HR means that whatever a manager or administrative staff is doing is going to get dropped to make phone calls and send emails. <p>An automated reporting system relies on access to clean, complete, and accurate databases. Public Works is further along through MESH and Recreation and Works could also benefit by using MESH to manage maintenance activities.</p> |
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| | <p>For now, MS Excel spreadsheet are a good starting point to identify meaningful KPI (key performance indicators) and understand the efforts required to track, input data and report on results and performance.</p> <p>The best approach is to have team members involved in KPI selection and tracking.</p> <ul style="list-style-type: none"> • <u>Brainstorm.</u> The starting point is to ask the following question: What determines if as a team we are having a Good Day? The answers should not be judged, just captured as a typical brainstorm exercise. • <u>Classify answers.</u> The answer might be a few statements or many, so an assessment of the answers is necessary to identify “buckets” to use as categories. A category for each independent metric and similar metrics to be collected within the category. • <u>Define data aggregation based on causality.</u> Some metrics are stand-alone while others contribute or are dependent on the outcomes of others. For example, the number of jobs completed in any given day by Public Works crews depends on the complexity of the job and/or the distant driven to get to them; so, a good metric would be a ratio of: [hours at work / total hours on the shift] the higher the number the more time a team member spend working and less driving. This ratio needs context so should be accompanied by information on the percentage of work orders originated by pre-planned work plans as oppose to work orders originated by a call or complaint. The intention is to monitor the efficiency of work assignments to increase working time and reduce driving time. • <u>Hierarchize.</u> Consolidate and combine similar metrics, eliminate redundant KPIs and select based on meaning and ease to track manually. Too many metrics, particularly while data collection and reporting remain manual might be too onerous and defeat the purpose of measuring results and performance. |
| <p>Recommendation #32</p> | <p>Implement a graphical reporting visual interface like Power BI.</p> |

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| | A tool is required to pull data from the various data sets and use it for analysis and to populate models and simulations. |
| Current Situation | Results and performance monitoring are performed manually. |
| Benefits | <ol style="list-style-type: none"> 1. Is a morale booster as it provides the opportunity to provide meaningful feedback and prove that assigned duties were important and contributed to MNBP's goals? 2. Regular measurements and the ability to report on them are the foundation of a continuous improvement program and the path towards increased productivity. |

2.10. Material Management

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| Recommendation #33 | <p>Consolidate procurement plans.</p> <p>Calendarize planned procurements as soon as they are known.</p> <p>Careful to avoid scope creep, a consolidated calendar of planned procurements allows for identification of common times and creates the opportunity to combine similar procurements for better value.</p> |
| Current Situation | Procurements are mostly conducted based on prior experience and independently. |
| Benefits | <p>Additional benefits are:</p> <ul style="list-style-type: none"> • The possibility to seek combination opportunities with neighbouring municipalities or with the Region. • The possibility to “piggyback” on similar procurement processes and repurpose documents, contracts, etc. |

2.11. Proforma Financial Statements

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| Recommendation #34 | <p>Model decisions in a financial statement format to anticipate consequences and determine benefits.</p> <p>The implementation of a master budget methodology as per managerial accounting guidelines and responsibility</p> |
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| | accounting principles is a valuable tool to model decisions and bring a discipline approach in the evaluation of new projects and options to execute them. |
| Current Situation | There are no standardize protocols for financial evaluation. |
| Benefits | Provides the analysis required to assess ROI and implement the recommendations described in the Structural Changes recommendation segment of this report. |

2.12. Implement HRM (Human Resource Management)

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| Recommendation #35 | <p>Implement a full cloud based HRM (HRIS) software.</p> <p>Wages and benefits are the largest budget item in a municipal budget.</p> <p>Attendance management is one of the most onerous administrative processes.</p> |
| Current Situation | HR systems are mostly to process and pay employees. |
| Benefits | <ul style="list-style-type: none"> • Free up significant time with self-service features. • Better tracking and transparency. • Data set on a valuable resource that should be a study to confirm compliance and seek ways to increase productivity. |

2.13. Document Management

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| Recommendation #36 | <p>Implement the use of SharePoint as document repository and knowledge base.</p> <p>It is imperative that all activities be digitize. The information and knowledge contained in paper documents is difficult to extract and use, in most cases not leveraged.</p> |
| Current Situation | There are no document management protocols and many activities remain paper base. |
| Benefits | <p>Digital documents:</p> <ul style="list-style-type: none"> • Can be easily repurposed to similar tasks. • Data extraction can be automated. • Study and learn faster from previous events. • Increase the ability to take corrective measures faster as feedback is provided sooner. |

Conclusion

Hopefully after you read this document one of the first reactions is that these recommendations are doable.

MNBP has many of the foundational elements already present. There is a need to add new technology after standardizing and documenting processes. The main changes required are in decision-making, prioritization of the use of time, and project management.

Change is a highly involved process that requires intention and discipline and more than anything time.

This report has attempted to describe some methodologies to help MNBP senior leadership team find the time necessary its ambitious modernization agenda.

Change requires clarity, an emotional connection with those affected and modifications to the usual environment and practices to prevent inertia from taking over.

The recommendations in the Structural Changes segment were meant to describe protocols that when implemented will hopefully modify behaviours.

The emphasis on measuring results and performance seek to establish a connection through positive feedback and by the trigger that pride, and competition brings in all of us.

The time is good for change and MNBP has a strong foundation from which initiate its modernization journey.

Appendix: Recommendations Inventory

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| Structural Changes | <ol style="list-style-type: none"> 1. Start a log to record the amount of time required to evaluate each new request. 2. Factor the impact of dedicating time to evaluate new requests on available capacity. 3. Provide regular updates to Council. 4. Consider have a MNBP staff certified in ADKAR, from Prosci, OR follow a practitioners' approach, by which an ADKAR certified consultant is retained to coach a project team on the use of the methodology, a "train the trainer" approach, this way Municipal staff gets to learn the methodology by practicing it. 5. Introduce a roster prequalified services in the skills required for successful project execution, in a manner that is flexible and responsive to specific needs. <ul style="list-style-type: none"> • Write business cases • Project plans • Business process redesign • Conduct RFPs up to contract award • Data analytics • Training • System support and administration • Etc. 6. Assign a budget to the roster; to be used on a first come, first serve basis. 7. Develop a template for each key area. 8. Update each template regularly: progress made, KPIs, and new activities. 9. Future RFPs must factor integration with current technology. 10. Future technology implementation projects should consider system's commissioning and a roll out monitoring phase to ensure solution is being used. 11. Prioritize the use of current technology, particularly when it is possible to replace manual process with technology already available. |
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| | <p>12. Establish a process documentation program. Initiate with an inventory of all processes and follow up with a commitment to map at least two processes a month.</p> <p>13. Collect data. Identify MNBP’s key metrics and incorporate data collection as part of daily responsibilities throughout the organization, start by questions ask by Council and/or the public frequently that usually take time to answer.</p> |
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| <p>Operational Efficiency Opportunities</p> | <p>14. Implement a digital booking platform with full self-service capabilities including payment acceptance.</p> <p>15. Use the booking application when processing walk-in and / or phone requests.</p> <p>16. Extend the functionality of the digital booking platform to double up as a CRM (customer resource management) to add account management to all citizen and customer interactions.</p> <p>17. Add Recreation and Parks maintenance activities to MESH database</p> <p>18. Link the Public Works field crews’ smart phones / tablets to MESH’s location capabilities</p> <p>19. Link the Recreation and Parks crews’ smart phones / tablets to MESH’s location capabilities.</p> <p>20. Add MESH’s time sheet module for Public Works.</p> <p>21. Add MESH’s time sheet module for Recreation and Parks.</p> <p>22. Formalize the work order scheduling, tracking, and closure processes.</p> <p>23. Install a large monitor to report on daily activities and open work orders that is accessible to all staff.</p> <p>24. Structure work to empower administrative assistant jobs.</p> <p>25. Define and track KPI (key performance indicators) to monitor results and performance.</p> <p>26. Implement a graphical reporting visual interface like Power BI.</p> |

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| | <p>27. Consolidate procurement plan and calendarize planned procurements as soon as they are known.</p> <p>28. Model decisions in a financial statement format to anticipate consequences and determine benefits.</p> <p>29. Implement a full cloud based HRM software.</p> <p>30. Implement the use of SharePoint as document repository and knowledge base.</p> |
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